



Development Monitoring System Report

Howard County, Maryland

Prepared by
Howard County Department of Planning and Zoning

January 2003



DEPARTMENT OF PLANNING & ZONING

Joseph W. Rutter, Director

January 16, 2003

A Message from the Planning Director:

I am pleased to present the annual Development Monitoring System Report. This is the eleventh report issued since the County adopted the Adequate Public Facilities Ordinance (APFO) in 1992. The report tracks all development activity in the County from initial sketch plan phase to final building and use & occupancy permits. Subdivision and site development activity is tracked daily and updated on DPZ's web site on a weekly basis allowing live searches by address in an interactive map format. This report summarizes this activity in addition to other permitting activity and includes sections on population and employment impacts from both new development and development in the pipeline. Housing sales data, land preservation and the status of APFO housing unit allocations are also included. The intent is to consolidate, summarize and discuss development activity in Howard County on a yearly basis in a single report. Highlights to the report are noted on Page 2 of the Executive Summary.

Last year there were 1,951 housing units built in the County. Fifty-two percent of these were single family detached units, 19 percent townhouse units and 29 percent apartment units (including condo apartments). Over the past five years there has been an average of 2,075 new housing units built. Housing development has slowed in the last two years, however, to levels below this average and less than the five year high two years ago when there were 2,494 units built. This reduced level will continue in the years ahead reflecting the new APFO growth limits as established in the 2000 General Plan. Last year, as part of the subdivision process, 192 acres were permanently preserved as agricultural and environmental easements in the Rural West. An additional 400 acres of agricultural land were preserved as part of the County's Purchase of Development Rights Program.

Non-residential development activity slowed somewhat last year compared to previous years with 1.8 million square feet in issued building permits, less than the five year average of about 2.9 million square feet annually. Office and industrial space, in particular, saw significant reductions last year reflecting the slowing economy. However, there are about 1.7 million square feet in-process in site development plans for the current year compared to 1 million square feet in process the previous year, an indication that the economy continues to remain relatively strong in Howard County. Although rapid employment growth like that of the late 90's is unlikely to occur in the immediate future, the County is poised to continue to have moderate job growth in the years ahead.

Sincerely,

Joseph W. Rutter
Director

Development Monitoring System Report

Date Issued:

January 2003

Reporting Period:

October 1, 2001 to September 30, 2002
With countywide summaries from October 1, 1997

Produced by:

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Executive Summary

Adequate Public Facilities Act

The Adequate Public Facilities Act of 1992, expressed "the need to provide a growth management process that will enable the County to provide adequate public roads and schools in a timely manner and achieve General Plan growth objectives. This process is designed to direct growth to areas where an adequate infrastructure exists or will exist."

Section 16.1108 of the Adequate Public Facilities Act directs that "The Department of Planning and Zoning will monitor the growth of housing and employment in Howard County and shall issue reports which indicate:

- (1) Subdivision plans and site development plans approved during the last several years, including number of residences or the number of new employees projected for the approved subdivisions and land developments.
- (2) Subdivision plans and site development plans in-process at the time of the report, including the number of housing unit allocations or the number of new employees projected for the proposed subdivisions and land development.
- (3) Building permits and certificates of occupancy issued during the last several years, indicating the number of dwelling units and the projected number of new employees for which building permits or certificates of occupancy were issued."

This is the eleventh annual Development Monitoring System report prepared by the Department of Planning and Zoning. The report tabulates and analyzes recent and current development activity at each stage of the County's land development review and approval process. These stages include subdivision plans, site development plans, building construction permits and use and occupancy permits.

Both approved and currently in-process land development plans are tabulated. Annual data for development activity are reported for the period October 1 through September 30 for the past five years beginning in October 1, 1997. More detailed information is reported for the most current year, October 1, 2001 to September 30, 2002. The report is divided into Residential and Non-Residential parts.

The section below discusses the highlights in this year's report. The following sections discuss the residential and nonresidential findings in more detail providing comparison charts by development stage. The second and third parts of this report, beginning on Pages 17 and 53, respectively, provide even more detail within each stage of development as well as further explanation on the land development process in Howard County.

Highlights

Residential Development

- Over the last five years, residential building completions, measured by use and occupancy permits, have averaged 2,075 new units per year.
- Last year, there were 1,143 lots recorded, 1,607 units approved in site development plans, 1,642 building permits issued and 1,951 use and occupancy permits issued. *Issued building permits and use and occupancy permits are lower than their respective five year averages, whereas recorded lots and units in approved site development plans are higher:* 1,060 lots recorded, 1,396 units approved in site development plans, 2,046 issued building permits and 2,075 use and occupancy permits.
- Countywide, last year about 65 percent of issued building permits were

for single family detached units, 22 percent for townhouses and 13 percent for apartments. For issued use & occupancy permits, 52 percent were for single family detached units, 19 percent for townhouses and 29 percent for apartments.

- Last year 39 percent of all building permits were issued in Ellicott City, 20 percent in the Rural West, 19 percent in Columbia and 12 percent in the Southeast. The remaining 9 percent were issued in Elkrige.
- As of September 30, 2002 there were 6,776 units in the subdivision process. This represents all units in plans under review prior to being recorded and is 249 units less than the 7,025 units in process one year earlier (September 30, 2001). Almost 60 percent of the 6,776 units in process are part of phased plans, however, with building planned for future years as far out as 2015. The larger phased plans include Emerson and Maple Lawn in the Southeast and Turf Valley, Waverly, Mount Joy Farm and the Taylor properties in Ellicott City.
- Countywide, 45 percent of the units in process on September 30, 2002 were single family units. About 23 percent were single family attached units and another 32 percent were apartment units (including condos).

Preservation

- Last year, 592 acres of agricultural and environmentally sensitive land were permanently preserved. A little over 400 of these acres were preserved through the County's Purchase of Development Rights Program. The remaining 192 preserved acres is a result of subdivision activity using the Density/Cluster Exchange Options (DEO/CEO) and cluster subdivision zoning regulations.
- Since 1992, 8,980 acres have been subdivided in the West using the DEO/CEO and cluster subdivision zoning regulations. About 69 percent of this total, 6,151 acres, has gone into preservation and permanent open space. The remaining 31 percent, 2,829 acres, has been or is planned for development on 2,248 lots and 222 acres of roadway.

Housing Sales

- The cost of housing in Howard County has been increasing steadily, from a mean sales price of \$201,698 in 97/98 to \$257,946 last year for all housing types combined. This is an overall increase of almost 28 percent over the four year time period and an average annual increase of 6.3 percent.
- Most of this increase is reflected in the cost of single family detached homes, with the mean sales price increasing by about \$100,000, from \$248,800 four years ago to \$348,300 last year, a 40 percent increase. About one-third of this increase has occurred in the last year alone and almost 60 percent of the increase has occurred in the last two years. (See page 46 for further details.)

Non-Residential Development

- Last year, the State reported 2,377 new jobs in Howard County. This is only about 40 percent of the 5,874 jobs added the previous year and reflects the slowing economy. Over the last 5 years, the State reports that 28,194 new jobs were created, an average of 5,639 per year.
- Based on building space in last year's approved site development plans an estimated 3,100 jobs could be accommodated. About 3,100 potential jobs could be accommodated based on last year's issued building permits.
- Last year almost 1.7 million square feet of building space was approved in site development plans. Issued building permits accounted for about 1.8 million square feet. This is a significant decrease compared to previous years, a reflection of the slower economy. Over the last five years, the average annual amount was 3.1 million square feet in approved site development plans and 2.9 million square feet in issued building permits.
- In particular, there was a significant reduction in manufacturing/extensive industrial space, from 1.6 million square feet in approved site development plans in 00/01 to only 360,000 square feet approved last year. For issued building permits there were about 1.4 million square

feet in 00/01 compared to only 188,000 square feet last year. In both cases most of this space is in the I-95 Corridor.

- There were also large reductions in the amount of approved office/service space – 1.8 million square feet in 00/01 and about 600,000 square feet last year for site development plans. For building permits the numbers were about 1.5 million square feet in 00/01 to only about 650,000 square feet last year.
- The amount of new government & institutional (mostly due to new schools and school additions) and retail space increased last year compared to the year before helping to offset the significant reduction in office/service and manufacturing/extensive industrial space.
- As of September 30, 2002, there were about 1.7 million square feet in-process in site development plans. This is greater than the 1 million square feet in process the previous year, but less than the 2.7 million square feet in process the year before.

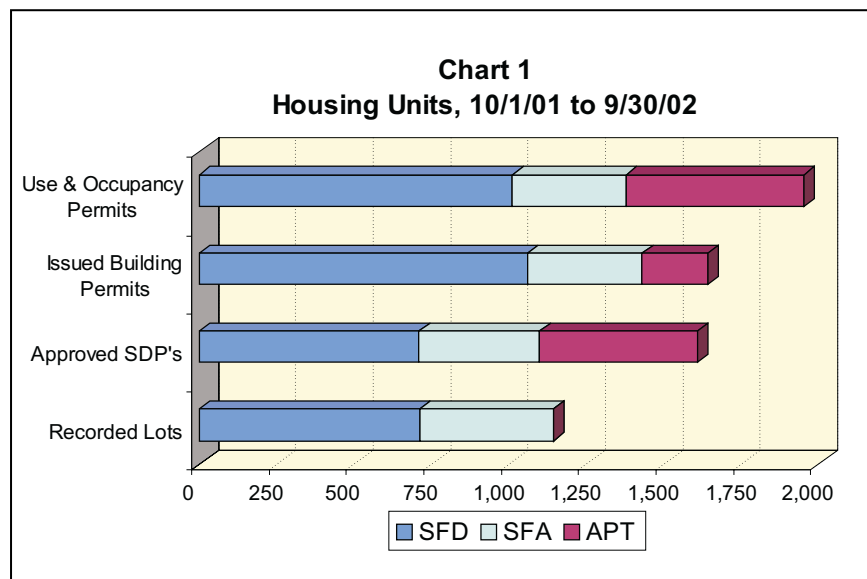
Residential Development

Development Activity

Chart 1 shows residential development activity from October 1, 2001 to September 30, 2002. Last year, a total of 1,951 use & occupancy permits and 1,642 building permits were issued. There were 1,607 units in approved SDPs and 1,143 units from recorded lots.

As indicated in Chart 2, for the five year growth period from October 1, 1997 to September 30, 2002, a total of 10,373 use & occupancy permits and 10,229 building permits were issued. This averages to 2,075 use and occupancy permits and 2,046 building permits issued per year over the five year time period. Over the five years, there were a total of 6,979 units in approved SDPs and 5,301 units from recorded lots. This results in a five year average of 1,396 and 1,060 units per year, respectively.

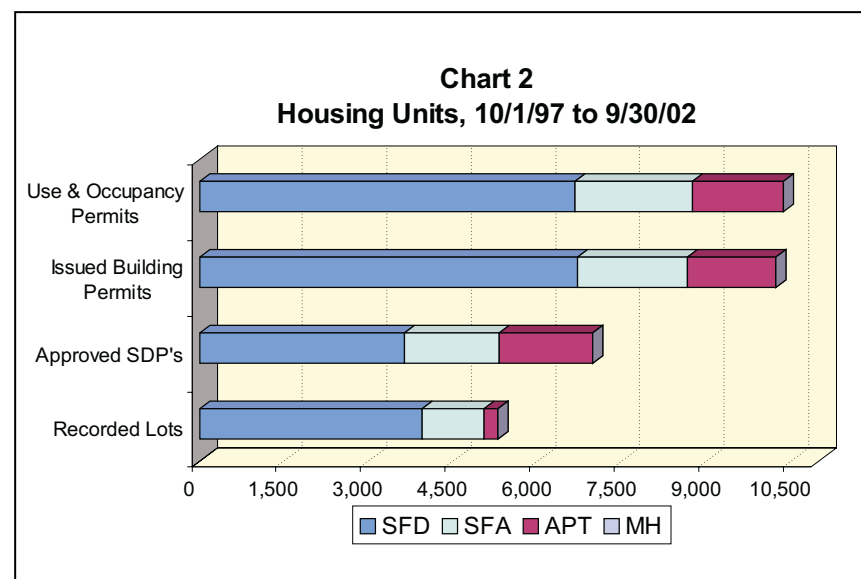
It is important to note that residential development in the County typically



begins with the subdivision process where new lots are recorded, followed by the site development plan (SDP) process, and then the issuance of building and use & occupancy permits. However, not all recorded lots must go through the SDP phase and not all units reflected in SDP's are units that went through the subdivision process.

Prior to recent amendments to the Subdivision and Land Development Regulations, effective January 8, 2002, residential SDPs were required for all residential lots 20,000 square feet or less. The amended regulations now require site development plans for *all lots in the East*. Most lots in the Rural West are larger than 20,000 square feet. Consequently, SDPs do not account for all residential growth in the County.

Also, not all units in SDPs, such as apartment buildings on bulk parcels, go through the subdivision process. Furthermore, some lots that have been built on were recorded or in existence prior to 1997. Since all new housing units require building permits and ultimately use and occupancy permits, these measures more fully reflect actual development activity in the County. This also explains why the numbers of recorded lots and units in SDPs are less than the numbers of building and use & occupancy permits.

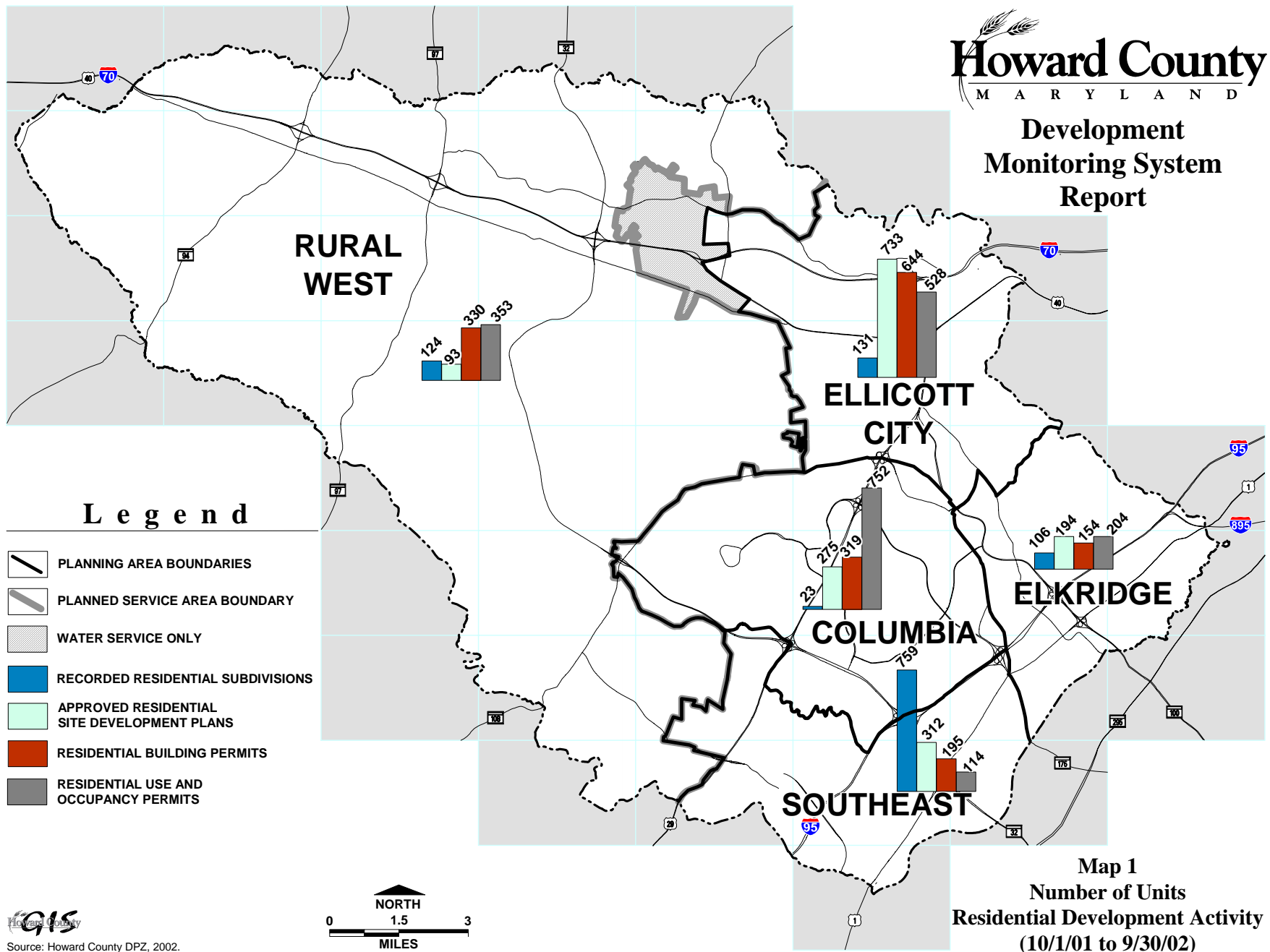


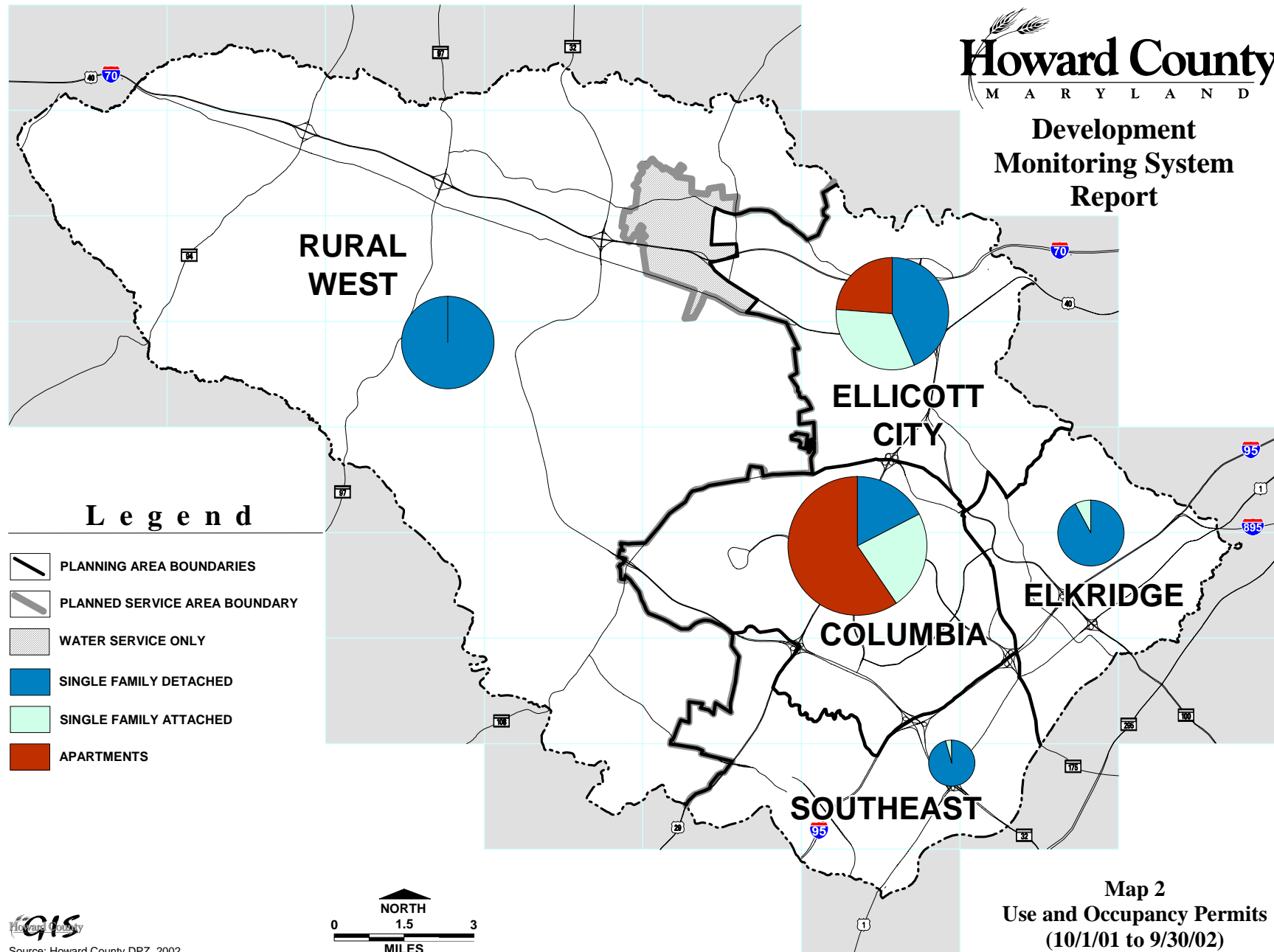
Development Location

Map 1 shows the development activity last year for each development stage by planning area. Residential development activity is reported by five planning areas. These planning areas are consistent with General Plan projections and the Adequate Public Facilities Ordinance.

It is clear that much of the activity has been concentrated in Ellicott City, Columbia and the Southeast. There has been comparably less activity in the Rural West and Elkridge. Note that in the Southeast, the number of newly recorded lots is high which will result in more building and use & occupancy permits to come in the future. In Columbia, on the other hand, the numbers of recorded lots and approved units in SDPs are low, which will result in smaller numbers of issued building and use & occupancy permits. Ellicott City also had a significant number of units approved in SDPs. Like the Southeast, it can therefore be predicted that a commensurate number of permits will follow.

Map 2 shows the use & occupancy permits issued last year by unit type for each planning area. In addition to showing the unit type breakdown in each





region, the size of the pie charts also reflect the relative number of issued permits.

The overall Countywide breakdown of issued use & occupancy permits last year was 52 percent single family detached, 19 percent single family attached and 29 percent apartment units. The map clearly shows how this varies by planning area with virtually all of the permits for apartments and single family attached units being issued in Columbia and Ellicott City.

Plans In Process

Chart 3 shows the number of potential housing units that are in the subdivision and site development plan process. These are units in subdivision plans that are not yet recorded and site development plans that are not yet approved. As of September 30, 2002, there were 6,776 units in the subdivision process and 1,151 units in the site development plan process. For comparison purposes, for the previous year on September 30, 2001 there were 7,025 units in the subdivision process and 1,065 units in the site development plan process.

It is important to note that a significant number of the 6,776 potential units in the subdivision process are part of phased projects with building planned for future years. In fact, of the total 6,776 units, 3,994 units are part of phased plans, with building planned as far out as 2015 (in the case of Maple

Lawn). This represents 59 percent of the total units in process. All of the phased projects are either in the Southeast or Ellicott City. The larger phased projects include Emerson and Maple Lawn in the Southeast and Waverly, Turf Valley, the Taylor properties and Mount Joy Farm in Ellicott City.

Plans in Process by Location

Map 3 shows the in process plans distributed by location. Of the 6,776 potential units from subdivision plans in process, Ellicott City had the greatest number with 2,934, 43 percent of the total. This is closely followed by the Southeast with 2,203 units in process (33 percent). The Rural West had 944 units in process, followed by 654 in Elkridge and 41 in Columbia.

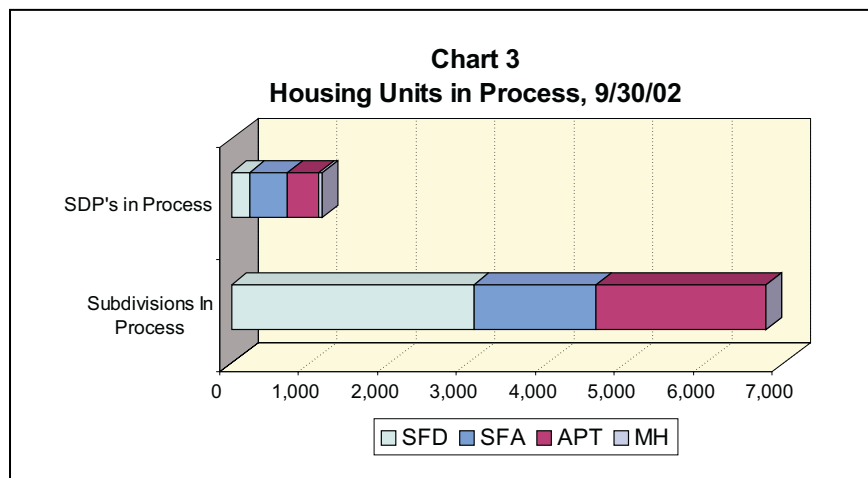
Of the 1,151 units in the site development plan process, 437 were in Ellicott City, 370 in Elkridge, 194 in the Southeast, 143 in the Rural West and 7 were in Columbia.

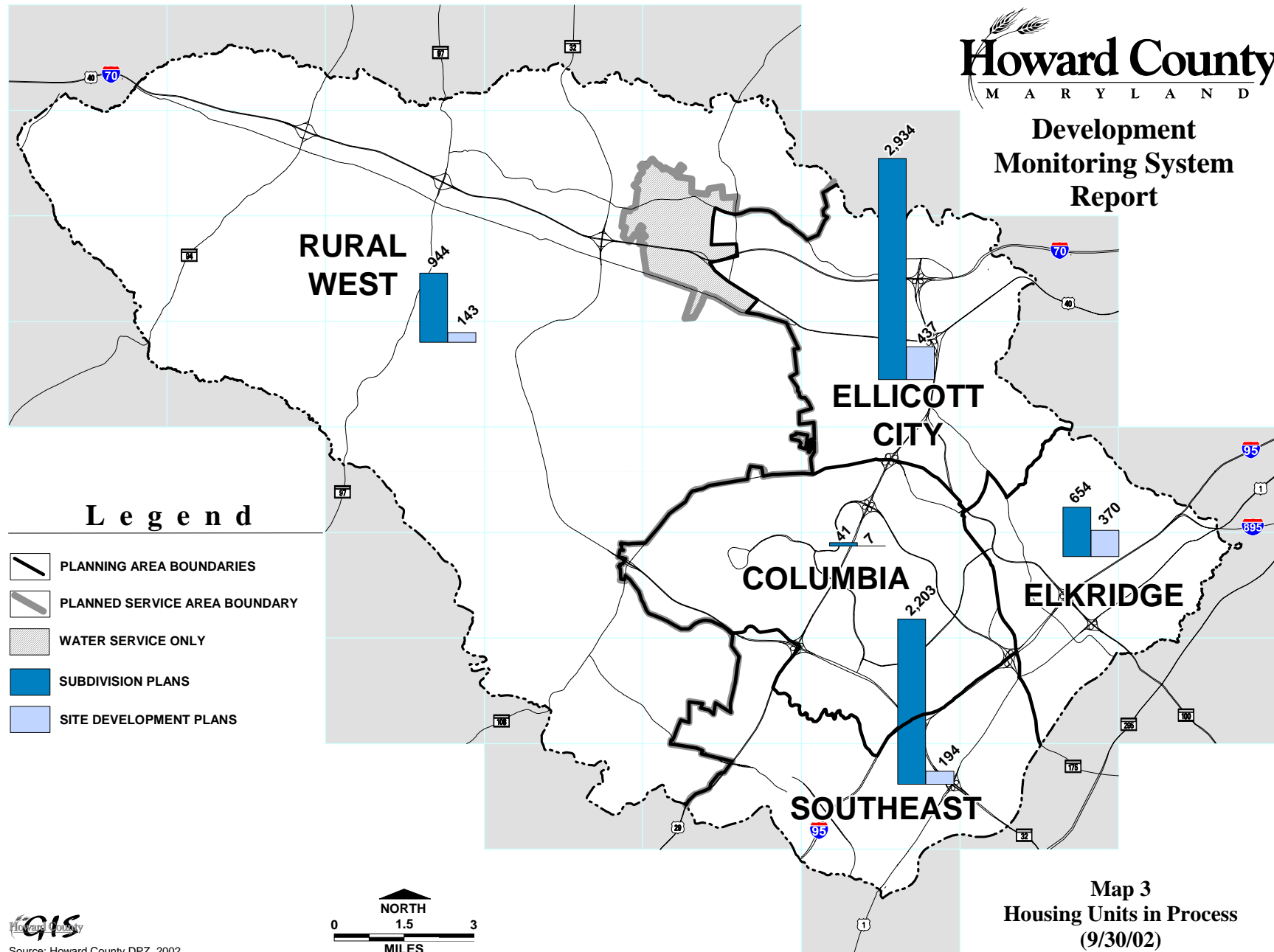
Map 4 shows the number of units in the subdivision plan process by unit type for each planning area. On September 30, 2002 all planning areas had single family detached units in process. Most in process single family attached or townhouse units were in the Southeast, the location of three mixed use projects – Emerson, Maple Lawn and Cherry Tree. The Southeast also had a large number of apartment units in process, although Ellicott City had the most. Columbia and the Rural West only had single family detached units in process.

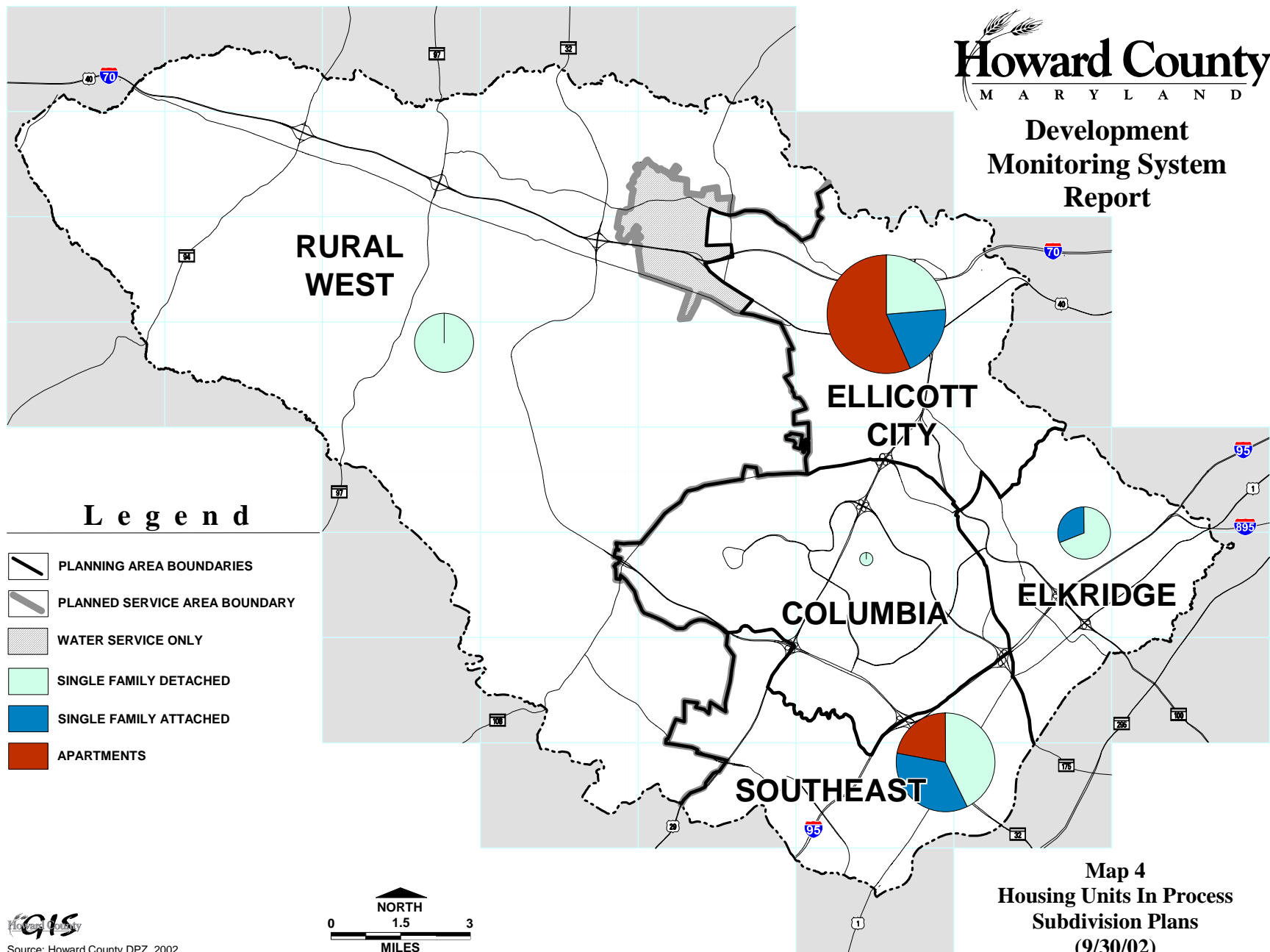
Countywide, 45 percent of the units in process on September 30, 2002 were single family units. About 23 percent were single family attached units and another 32 percent were apartment units.

Land Preservation

Last year, from October 1, 2001 to September 30, 2002, 400.5 acres of agricultural land were preserved through the County's Purchase of Development Rights Program (PDR). An additional 54 acres were dedicated and enrolled in the Agricultural Preservation Program through the subdivision process. Another 138 acres were dedicated as joint Howard







County/Homeowner's Association preservation parcels resulting in a total of 592.5 permanently preserved acres in the Rural West last year.

Since 1992, 8,980 acres have been subdivided in the West using the DEO/CEO and cluster subdivision zoning regulations. About 69 percent of this total, 6,151 acres, has gone into preservation and permanent open space. The remaining 31 percent, 2,829 acres, has been or is planned for development on 2,248 lots with 222 acres of roadway.

To date, there are 18,800 acres of permanently preserved agricultural land in the Rural West and about 4,109 acres preserved as other easement types, for a total of 22,909 acres. This is about 24 percent of the approximate 94,600 total acres of land in the Rural West.

Including County and State parks and open space and WSSC land (9,300 acres), permanent historic easements (130 acres) and other environmental easements (940 acres) the total preserved land amounts to 33,279 acres, about 35 percent of all land in the Rural West. Please refer to the Land Preservation Section, Page 49, for further details.

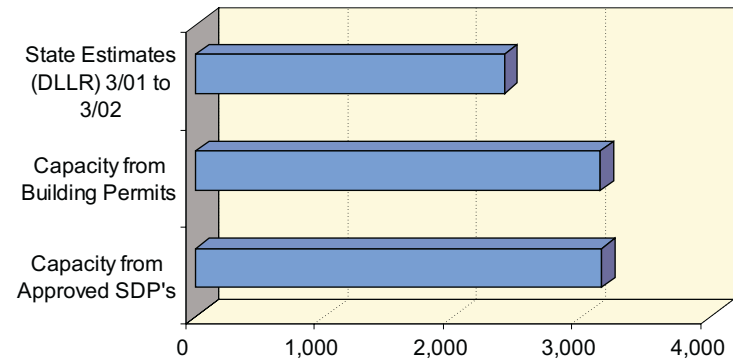
Non-Residential Development

Job Growth

Charts 4 and 5 show potential employment from approved site development plans and issued building permits compared to actual job growth based on estimates from the State Department of Labor, Licensing and Regulation (DLLR).

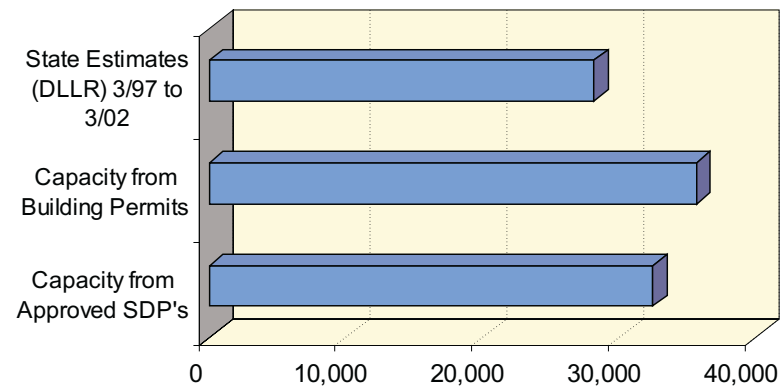
Potential employment growth from approved site development plans and building permits has been estimated based on information provided by the employer or as indicated on the plan. In some cases, calls were made to prospective employers. Where this information was not available a generalized ratio of employees to square footage was used. This ratio varies depending upon the category of non-residential use (retail, office/service, manufacturing/extensive industrial and government/ institutional).

Chart 4
1-Year Job Growth, 10/1/01 to 9/30/02¹



1. Monthly range for all except for State estimates, which are from 1st Quarter data, the latest available.

Chart 5
5-Year Job Growth, 10/1/97 to 9/30/02¹



1. Monthly range for all except for State estimates, which are from 1st Quarter data, the latest available.

The one-year job growth estimates from the State from first quarter 2001 to first quarter 2002 indicate that there were 2,379 new jobs added to Howard County. This is only about 40 percent of the previous year's increase of 5,874 jobs as reported by the State, an indication of the slowing economy.

Job growth as reported by the State over the five year period totals 28,194 new jobs. On average, this is a net gain of 5,639 new jobs per year. The yearly gain in jobs has slowed from a peak of 7,193 new jobs from 1999 to 2000, to 5,874 from 2000 to 2001, to only 2,379 new jobs last year. There were 6,918 new jobs from 1998 to 1999 and 5,812 new jobs from 1997 to 1998. Despite the recent economic downturn, Howard County has still seen job increases, although smaller than the boom period of the late 1990's and into 2000.

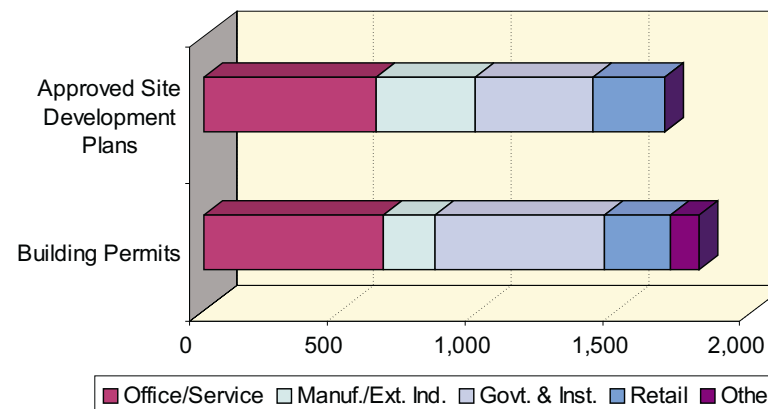
The potential jobs estimates from issued building permits and site development plans last year are 3,144 and 3,148 new jobs, respectively. If the new building capacity from this development activity continues to be utilized and vacancy rates don't substantially increase, this is an indicator that the County is poised to experience continued job growth. Note, however, that reflective of the economy, these estimates are lower than they were last year, when it was estimated that there was a potential for 7,643 and 9,072 new jobs from approved building permits and site development plans, respectively.

Chart 5 also shows that over the five year time period, from 1997 to 2002, 30,000 to 35,000 jobs could be accommodated in new approved non-residential space and issued building permits based on the methodology described earlier.

Development Activity

Last year, from October 1, 2001 to September 30, 2002, almost 1.7 million square feet of building space were approved in site development plans. Building permits were issued for close to 1.8 million square feet. Most of the space was for office/service space, followed by governmental & institutional space. Manufacturing/extensive industrial space and retail development were comparably less (Chart 6). Note that this is only about half of the amount of approved square feet and issued permits last year, 3.9

Chart 6
Non-Residential Square Feet (X 1,000)
10/1/01 to 9/30/02

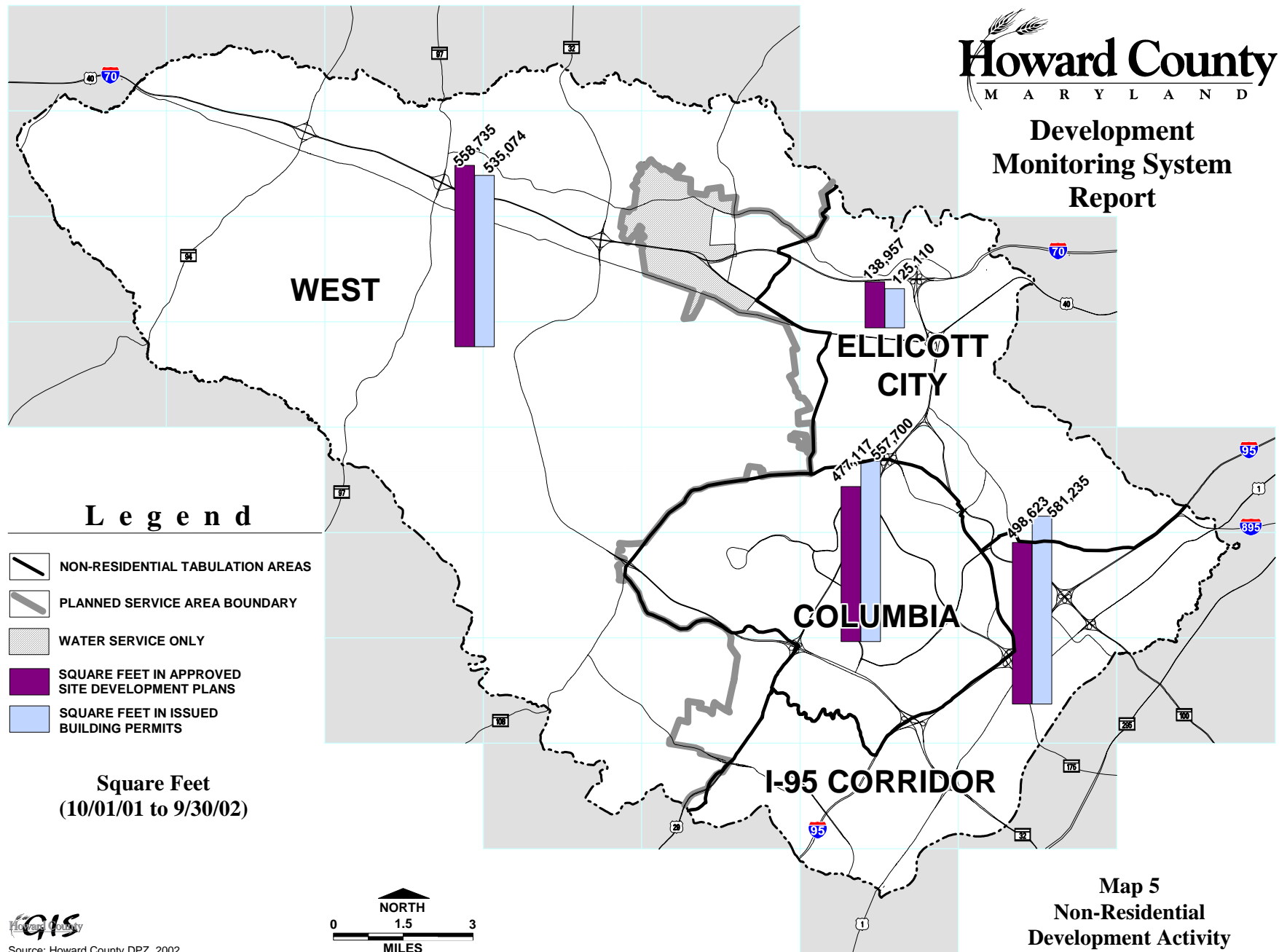


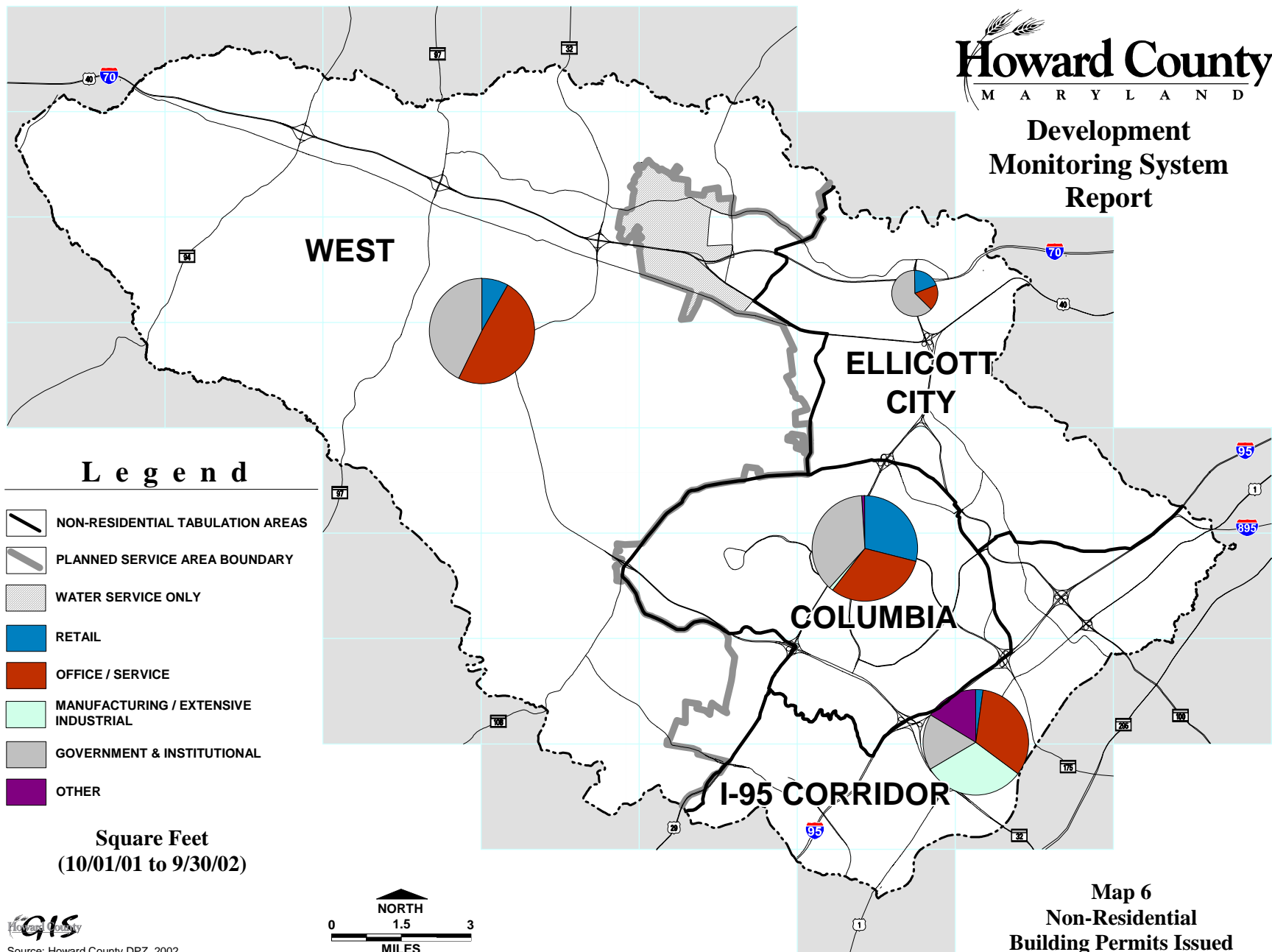
and 3.3 million square feet, respectively. This again reflects the slower economy and relative lack of demand.

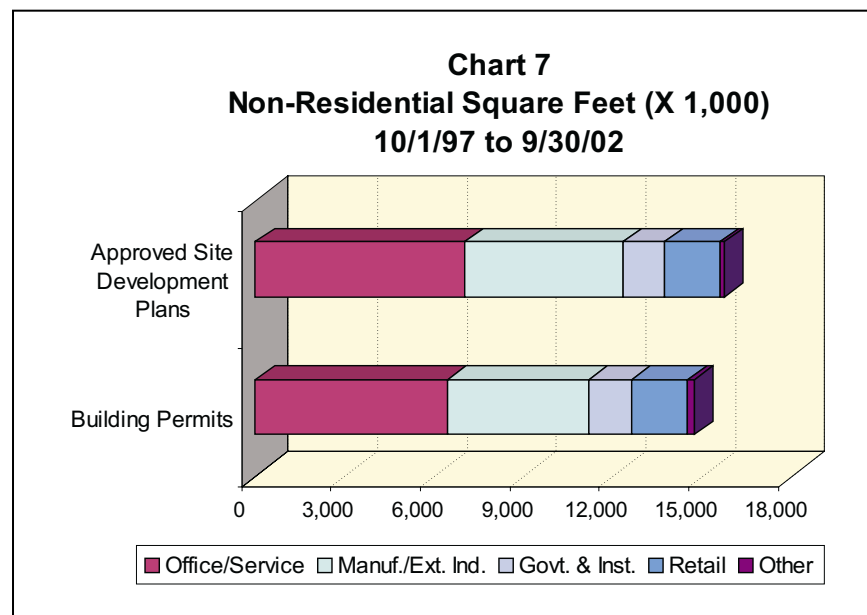
Chart 7 shows the results for the five year period from October 1, 1997 to September 30, 2002. During this time period about 15.7 million square feet were approved in site development plans and 14.7 million square feet in issued building permits. These represent averages of about 3.1 and 2.9 million square feet per year, respectively. Most of the new building space over the five years was for office/service uses followed by manufacturing/extensive industrial uses. Retail and government & institutional development were comparably less.

Development Location

Map 5 shows the one year total square footage by location for both building permits and approved site development plans. The map clearly indicates that about equal amounts of the non-residential development activity has been concentrated Columbia, the I-95 Corridor and the West. Smaller amounts of non-residential development have occurred in Ellicott City.







Map 6 shows the total square footage in issued building permits for the last year by type of development for each region. In addition to showing the building type breakdown in each region, the size of the pie charts also reflect the relative square footage in the issued permits. The overall Countywide square footage breakdown for permits issued last year is about 36 percent office/service space, 34 percent government & institutional, 13 percent retail, 10 percent manufacturing/extensive industrial space and 6 percent other space.

The map clearly shows how this varies by region with the majority of the manufacturing/extensive industrial development occurring in the I-95 Corridor (181,257), and only a slight amount in Columbia (6,600 square feet) for a total of almost 188,000 square feet. Compared to last year, however, there has been a significant reduction in this type of development, when there was a total of almost 1.4 million square feet in issued building permits, with over 1.1 million square feet in the I-95 Corridor. There was also a reduction, although not as drastic, in the amount of issued permits for office/service space, from about 1.5 million in 00/01 to 651,744 square feet last year. On the other hand, the amount of retail and government & institu-

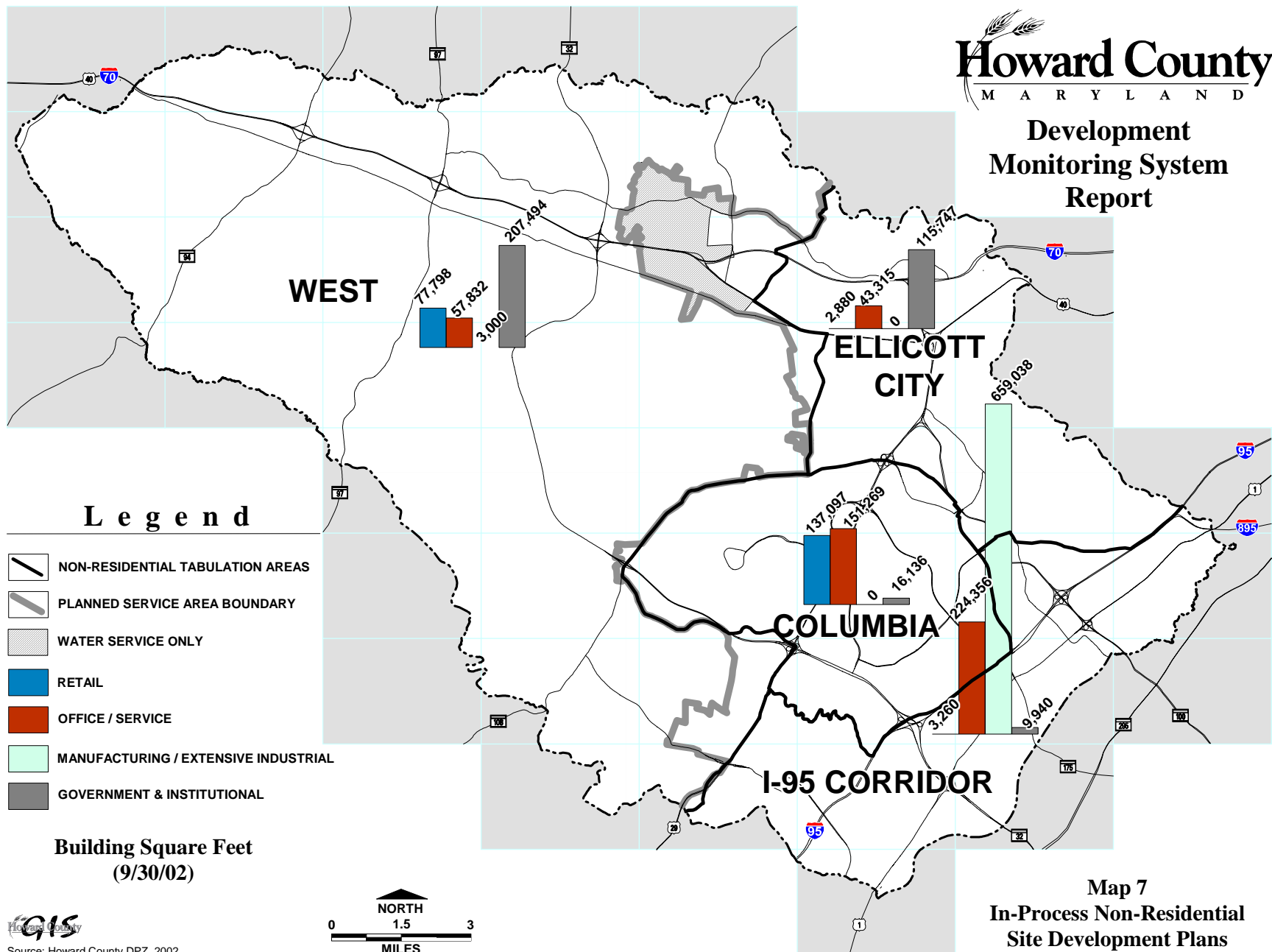
tional space increased last year compared to the year before. Similar reductions occurred for site development plans. Refer to Part 2 of this report beginning on Page 53 for further details.

Plans In Process

Map 7 shows the amount of non-residential building square footage in the site development plan process by location and by type of development. As of September 30, 2002, there were 1.7 million square feet in process. This compares to only slightly more than 1 million square feet in process for the previous year (as of September 30, 2001). This increase in the amount of in-process space, although not as high as the 2.7 million square feet in process two years ago in 2000, is an indication that there continues to be demand for new space. This bodes well for future job growth in the County.

Most of the current in process building space is in the I-95 Corridor. This is followed by planned space in the West, Columbia and Ellicott City, respectively.

Countywide, about 38 percent of the building space in the site development plan process is manufacturing/extensive industrial space. About 27 percent is office/service space and 20 percent government & institutional space. The remaining 13 percent is for retail space, and 2 percent other space.



Residential Development

Recorded Residential Subdivision

The development process in Howard County usually begins with the subdivision of land. Depending upon the size, type and location of subdivision, the process may include:

- a three-phase subdivision plan review process: sketch plan, preliminary plan, and final plan;
- an accelerated review: preliminary equivalent sketch plan and final plan;
- a minor subdivision review (four buildable lots or less) involving only a final plan.

Upon final subdivision plan approval, lots can be recorded. It is important to note that not all new housing units in the County, such as apartment buildings on existing parcels, go through the subdivision process. Furthermore, some lots that have been built on were recorded or in existence prior to 1997, the first year of this current DMS analysis period. Therefore, the number of recorded lots do not reflect all development activity in the County over the current reporting period.

For this report, the number of residential *plans* recorded, the number of potential *units* from recorded lots, and the *acreage* of plans recorded have been compiled by the planning areas shown on Map 8. Annual data for development activity are reported for the period October 1 through September 30.

Summary of Last Year's Result

Last year there were 1,143 housing units from recorded lots countywide in 140 subdivision plans totaling 2,499 acres (Table 1). The Southeast had two-thirds of the total units with 759. Ellicott City had 11 percent of the total with 131 units. This is closely followed by the Rural West with 124 units and Elkrige with 106 units. Columbia only had 23 units. These represent *net new unit* potential and do not include total recordations from resubdivisions. For example, in a few cases resubdivisions combine existing lots to create a smaller number of new lots compared to the original.

Of the total 140 subdivision plans recorded last year, 33 percent were in the Rural West, followed by 29 percent in Ellicott City. The remaining 38 percent of plans were in the Southeast, Elkridge and Columbia. Note that the total plans include subdivisions and resubdivisions that do not necessarily create new unit potential, such as plats that revise lot lines or add easements.

Of the total 2,499 acres recorded, 1,530 acres, or about 61 percent, were in the Rural West. It should be noted, however, that of the 1,530 recorded acres in the Rural West, 832 acres (54 percent) were for plats sending or receiving density as part of the density and cluster exchange subdivision process. Also, the recorded acres are for all areas include resubdivisions.

Table 1
Recorded Residential Subdivisions, 10/01/01 to 9/30/02

Planning Area	Units		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	23	2%	9	6%	20	1%
Elkridge	106	9%	21	15%	84	3%
Ellicott City	131	11%	41	29%	373	15%
Rural West	124	11%	46	33%	1,530	61%
Southeast	759	66%	23	16%	492	20%
TOTAL	1,143	100%	140	100%	2,499	100%

Table 2
Unit Potential from Recorded Lots by Unit Type, 10/01/01 to 9/30/02

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	23	0	0	0	23	2%
Elkridge	106	0	0	0	106	9%
Ellicott City	131	0	0	0	131	11%
Rural West	124	0	0	0	124	11%
Southeast	326	433	0	0	759	66%
TOTAL	710	433	0	0	1,143	100%
PERCENT	62%	38%	0%	0%	100%	

Chart 8
Recorded Lots by Unit Type - New Unit Potential
10/1/01 to 9/30/02

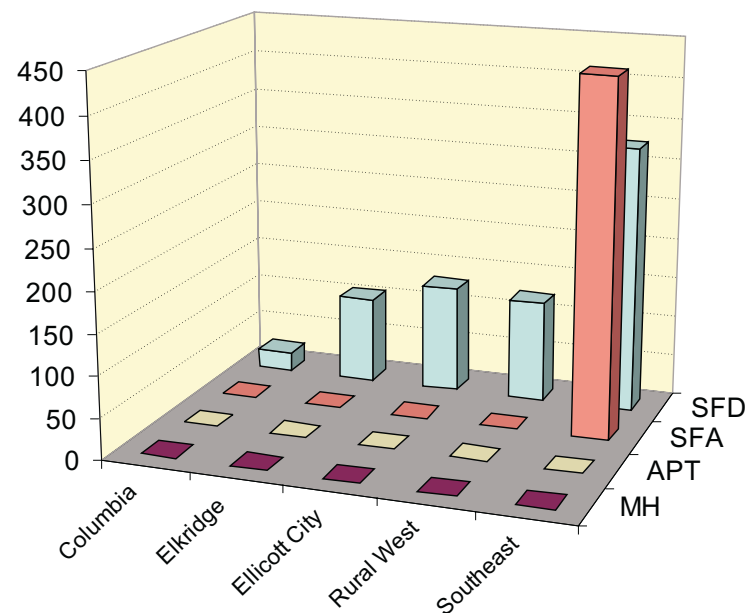


Table 2 shows new units from recorded lots by unit type. Of the 1,145 units from recorded lots, 710 are for single family detached units (SFD) and 433 are for single family attached or townhouse units (SFA). This represents 62 and 38 percent of the total units, respectively. There were no apartment or mobile home units from recorded plans last year. Chart 8 shows these results graphically.

Last Year's Projects - Greater than 30 Lots

Of the total 1,143 units from lots recorded last year, 840 or about 73 percent were in subdivisions consisting of more than 30 units. These larger subdivisions, shown in Table 3, are located in four of the five regions Planning Areas. The precise location of these plans are shown on Map 8.

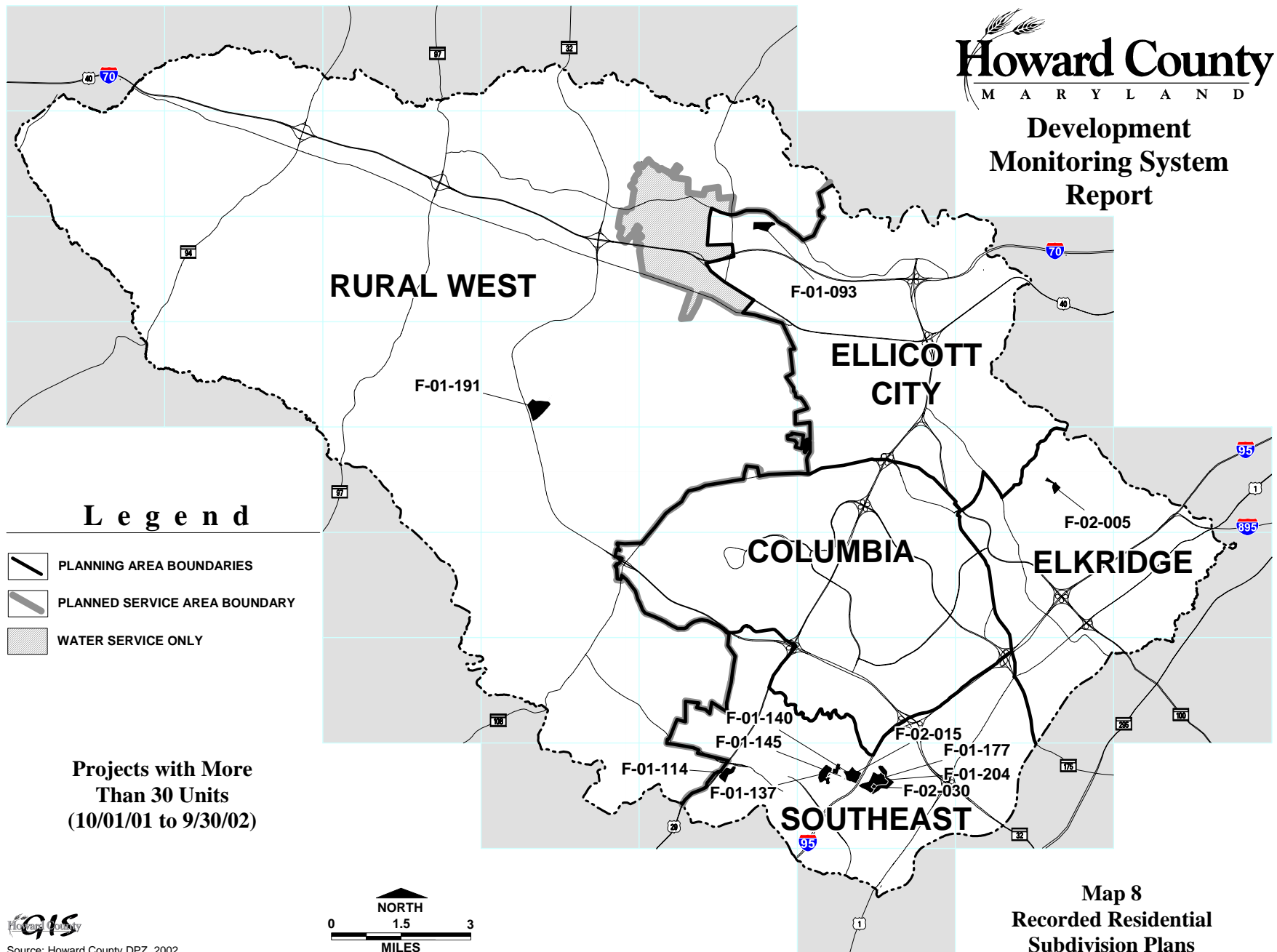


Table 3
Recorded Residential Subdivision Plans, Projects With More Than 30 Units, 10/01/01 to 9/30/02

Planning Area	File Number	Plan Name	Unit Type	Lots	Total
Elkridge	F-02-005	Glyncheste Farm	SFA	45	45
Ellicott City	F-01-093	GTW'S Waverly Woods	SFD	51	51
Rural West	F-01-191	Buckskin Ridge	SFD	47	47
Southeast	F-01-137	Emerson	SFD	160	
	F-01-145	Emerson	SFA	122	
	F-01-114	Cherrytree Park	SFA	106	
	F-01-137	Emerson	SFA	78	
	F-01-204	Stone Lake	SFD	70	
	F-02-015	Emerson (Formerly R-ED West)	SFA	54	
	F-01-177	Stone Lake	SFA	37	
	F-02-030	Stone Lake	SFA	36	
	F-01-140	Emerson (Formerly R-ED West)	SFD	34	
TOTAL					840

Most of the larger subdivisions were located in the Southeast consisting of the Emerson and Stone Lake developments, including 194 SFD units and 254 SFA units for Emerson and 70 SFD and 73 SFA units for Stone Lake. There were also 106 SFA units as part of the Cherrytree Park mixed use development.

In the Rural West there was one larger subdivision, 47 lots as part of Buckskin Ridge. In Ellicott City, there were 51 units recorded in a subdivision in the Waverly Woods development, and there were 45 lots recorded as part of the Glyncheste Farm subdivision in Elkridge.

Five Year Results

Table 4 shows the recorded subdivisions for the last five years from October 1, 1997 to September 30, 2002. Over this five year period lots for 5,301 units countywide in 744 subdivision plans totaling 14,146 acres were recorded. This equates to a five year average of 1,060 units per year. Note that the acreage recorded figure represents all residential acreage including resubdivisions and sending and receiving preservation parcels.

Given that the planning areas recently changed as a result of the adoption of

General Plan 2000, comparisons by planning area for each year are not available. Please refer to last year's DMS report for the detailed results by planning area for the 2000/2001 year, the first year these new areas went into effect.

Table 5 summarizes the number of units from recorded lots by unit type for each of the last five years. Over the last five years, recorded lots created the potential for 3,961 single family detached units, 75 percent of the total 5,197. A total of 1,085, 20 percent, were single family attached units and

Table 4
Recorded Residential Subdivisions, 10/01/97 to 9/30/02

Year	Units	Plans	Acreage
10/97 to 9/98	983	115	2,132
10/98 to 9/99	1,393	182	4,077
10/99 to 9/00	792	168	2,661
10/00 to 9/01	990	139	2,777
10/01 to 9/02	1,143	140	2,499
TOTAL	5,301	744	14,146
5 YEAR AVG.	1,060	149	2,829

Table 5
Unit Potential From Recorded Lots by Unit Type, 10/01/97 to 9/30/02

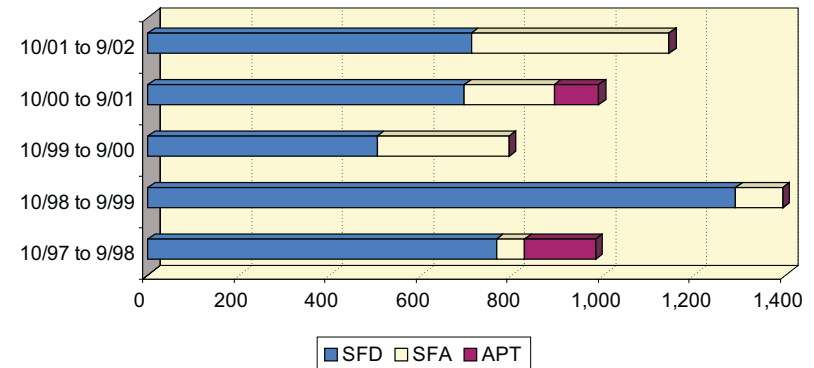
Year	SFD	SFA	APT	MH	Total
10/97 to 9/98	765	61	157	0	983
10/98 to 9/99	1,289	104	0	0	1,393
10/99 to 9/00	503	289	0	0	792
10/00 to 9/01	694	198	98	0	990
10/01 to 9/02	710	433	0	0	1,143
TOTAL	3,961	1,085	255	0	5,301
PERCENT	75%	20%	5%	0%	100%
5 YEAR AVG.	792	217	51	0	1,060

the remaining 255, 5 percent, were for apartments units. (As indicated earlier, these represent *net new unit* potential from recordations and do not include totals from resubdivisions.) Chart 9 is a graphical representation of recorded lots by unit type over the last five years.

Last Year Compared to Five Year Trends

Last year resulted in the second largest number of new unit potential from recorded lots with 1,143. This compares to 990, 792, 1,393 and 983 units for each of the 4 previous years, respectively, and is slightly more than the 1,060 five year average.

Chart 9
Recorded Lots by Unit Type - New Unit Potential
10/1/97 to 9/30/02



In-Process Residential Subdivisions

As indicated in the previous section, the development process in Howard County usually begins with the subdivision of land. Depending upon the size and type of subdivision, the process may include:

- a minor subdivision review;
- a three-phase subdivision plan review process: sketch plan, preliminary plan, and final plan;
- an accelerated review: preliminary equivalent sketch plan and final plan.

This section summarizes residential subdivisions in process, the development stage prior to recordation. Subdivision plans in four stages (sketch, preliminary equivalent sketch, preliminary, and final) are reported. The number of plans, potential units and acreage currently being processed as of September 30, 2002 are tabulated and compared with those in process a year earlier (as of September 30, 2001).

Note that since the five planning areas were new last year and do not compare to the six regions used in the past, detailed comparisons by area are not included. Refer to past year DMS reports for location specifics.

Number of Plans

There were 11 less residential plans in process as of September 30, 2001 than there were one year earlier – 179 plans in 2002 compared to 190 plans in 2001 (Table 6).

For the current year, the Rural West had the greatest number of residential plans in process with 61, followed by Ellicott City with 56. The Southeast and Elkridge had 30 and 24 plans in process, respectively. Columbia had only 8 plans in process.

Of the 179 plans in process on September 30, 2001, 93 were final plans, 41 were sketch plans, 25 were preliminary plans and 20 were preliminary equivalent sketch plans.

Table 6
Number of Residential Subdivision Plans in Process, 09/30/02
(With comparisons to Countywide total as of 09/30/01)

Planning Area	Preliminary Equivalent				TOTAL PLANS
	Sketch	Sketch	Preliminary	Final	
Columbia	0	3	0	5	8
Elkridge	8	2	5	9	24
Ellicott City	12	5	6	33	56
Rural West	13	5	10	33	61
Southeast	8	5	4	13	30
TOTAL	41	20	25	93	179
As of 09/30/01	48	11	19	112	190

Number of Potential Units

Similar to the number of plans, there were less potential units in process as of September 30, 2002 compared to a year earlier, 6,776 units compared to 7,025 units (Table 7). Ellicott City had the largest number of units in process in 2002 with 2,934, or 43 percent, of the countywide total. This is followed by the Southeast with 2,203 units in process (33 percent). The Rural West, Columbia and Elkridge planning areas had the remaining 1,639 units in process (24 percent).

It is important to note that a significant number of the 6,776 potential units in process are part of phased projects with much of the building planned for future years. As shown in Table 8, 3,994 units are part of phased plans, with building planned as far out as 2015 (in the case of Maple Lawn). This represents 59 percent of the total units in process. All of the phased projects are either in the Southeast or Ellicott City. The larger phased projects include Emerson and Maple Lawn in the Southeast and Waverly, Turf Valley, the Taylor properties and Mount Joy Farm in Ellicott City.

As reflected in Table 7, 45 percent of the units in process are single family detached units. About 23 percent are single family attached units and another 32 percent are apartment units (including condos). Table 9 shows details by plan stage and unit type for this year by planning area. Chart 10 graphically illustrates the units in process by unit type for each planning area.

Table 7
Number of Potential Units from Subdivision Plans in Process, 09/30/02
(With comparisons to Countywide total as of 09/30/01)

Planning Area	Single Family Detached	Single Family Attached	Apartments	Mobile Homes	TOTAL UNITS
Columbia	41	0	0	0	41
Elkridge	450	204	0	0	654
Ellicott City	697	575	1,662	0	2,934
Rural West	944	0	0	0	944
Southeast	942	775	486	0	2,203
TOTAL	3,074	1,554	2,148	0	6,776
PERCENT	45%	23%	32%	0%	100%
As of 09/30/01	3,519	1,764	1,742	0	7,025

Chart 10
Subdivisions in Process - New Unit Potential
9/30/02

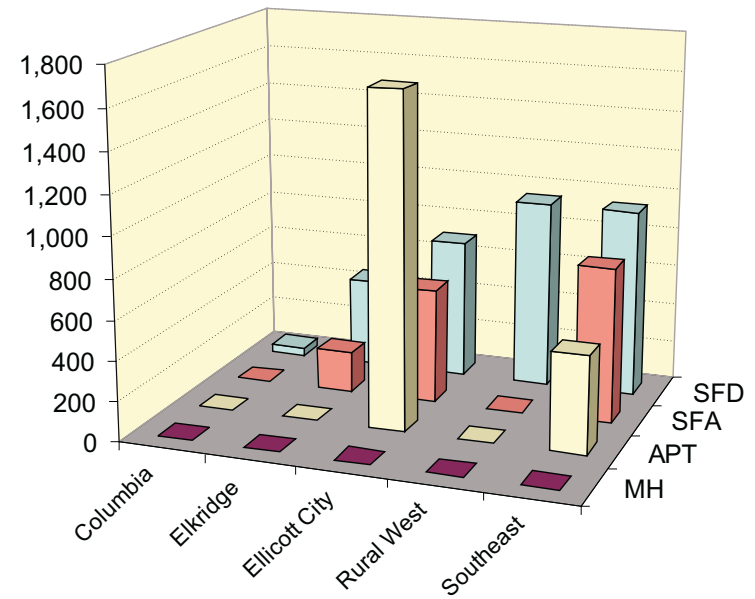


Table 8
Potential Units from Phased Projects

Planning Area	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	TOTAL
Columbia	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Elkridge	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Ellicott City	412	215	376	47	601	60	103	193	0	0	0	0	0	2,007
Southeast	0	0	392	354	290	240	220	155	100	75	75	45	41	1,987
Rural West	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTAL	412	215	768	401	891	300	323	348	100	75	75	45	41	3,994

Note: Does not include phased project units on already recorded plats.

Table 9
Number of Potential Units from Subdivision Plans in Process by Unit Type, 09/30/02

Planning Area	Sketch					Preliminary Equivalent Sketch				
	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Columbia	0	0	0	0	0	23	0	0	0	23
Elkridge	240	0	0	0	240	32	0	0	0	32
Ellicott City	274	261	796	0	1,331	85	0	0	0	85
Rural West	511	0	0	0	511	127	0	0	0	127
Southeast	651	510	486	0	1,647	91	54	0	0	145
TOTAL	1,676	771	1,282	0	3,729	358	54	0	0	412

Planning Area	Preliminary					Final				
	SFD	SFA	APT	MH	TOTAL	SFD	SFA	APT	MH	TOTAL
Columbia	0	0	0	0	0	18	0	0	0	18
Elkridge	155	12	0	0	167	23	192	0	0	215
Ellicott City	97	234	414	0	745	241	80	452	0	773
Rural West	165	0	0	0	165	141	0	0	0	141
Southeast	64	91	0	0	155	136	120	0	0	256
TOTAL	481	337	414	0	1,232	559	392	452	0	1,403

TOTAL - 09/30/02				
SFD	SFA	APT	MH	TOTAL
41	0	0	0	41
450	204	0	0	654
697	575	1,662	0	2,934
944	0	0	0	944
942	775	486	0	2,203
3,074	1,554	2,148	0	6,776

Number of Acres

As of September 30, 2002 a total of 6,001 acres of residential land were in the subdivision process. This is 466 acres more than the previous year, at which time there were 5,535 acres in process (Table 10).

The most acreage in process was in the sketch plan phase (3,087 acres). The final plan stage had 1,539 acres in process and the preliminary plan stage had 781 acres in process. There were also 594 acres at the preliminary equivalent sketch plan stage.

Major Projects

Table 11 shows a list of potential units from larger projects with 50 units or more. This list includes comprehensive or phased projects. Map 9 shows the location of these projects. Some of the larger projects in this list include Emerson, Maple Lawn Farms, Turf Valley, Village Crest, the Enclave at Ellicott Hills and Mount Joy Farm.

Table 10
Acreage of Residential Subdivision Plans in Process, 09/30/02
(With comparisons to Countywide total as of 09/30/01)

Planning Area	Preliminary Equivalent Sketch				TOTAL ACRES
	Sketch	Preliminary	Final		
Columbia	0	17	0	13	30
Elkridge	126	17	91	50	284
Ellicott City	972	51	139	326	1,488
Rural West	1,349	446	503	1,071	3,369
Southeast	640	63	48	79	830
TOTAL	3,087	594	781	1,539	6,001
As of 09/30/01	2,971	93	686	1,785	5,535

Table 11
In-Process Residential Subdivision Plans, Projects With More Than 50 Units, 09/30/02

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Elkridge	F-02-072	The Oaks at Waters Edge	SFA	192	461
	S-02-015	Owens Property	SFD	93	
	P-02-011	Cascade Overlook	SFD	70	
	P-02-027	Dennis Preserve	SFD	53	
	S-01-024	Kuhn Property	SFD	53	
Ellicott City	S-86-013	Turf Valley	APT	621	2,386
	F-02-047	Village Crest	SFA, APT - Age Restricted	318	
	P-02-003	The Enclave at Ellicott Hills	SFA, APT - Age Restricted	286	
	P-02-010	Mount Joy Farm	SFA, APT	249	
	S-03-001	Villages at Turf Valley	SFA, APT	241	
	S-94-007	Waverly Woods	SFD, SFA, APT	157	
	F-02-082	Oakmont at Turf Valley	APT	150	
	P-03-003	Mount Joy	SFA, APT	113	
	S-98-016	Autumn River	SFD, SFA	95	
	S-98-018	Worthington Fields	SFD	94	
	P-02-017	Mount Joy	SFD	62	
Rural West	S-01-031	Walnut Grove	SFD	93	401
	S-02-009	Riverwood	SFD	91	
	SP-02-013	Benedict Farm	SFD	87	
	S-02-014	The Warfields II	SFD	75	
	S-02-011	Turnbury Grove	SFD	55	
Southeast	S-01-017	Maple Lawn Farms	SFD, SFA, APT	996	2,019
	S-99-012	Emerson	SFD, SFA, APT	545	
	F-02-055	Emerson	SFA	120	
	F-03-013	Emerson	SFD	120	
	P-03-001	Maple Lawn Farms	SFD, SFA	120	
	SP-02-009	Jamestown Landing	SFD	64	
	SP-00-008	Cherrytree Park	SFA	54	
TOTAL					5,267



Approved Residential Site Development Plans

The site development plan (SDP) process is usually the next development stage after lots are recorded. Once an SDP is approved, building permits can be issued after which actual land development can begin. Prior to recent amendments to the Subdivision and Land Development Regulations, effective January 8, 2002, residential SDPs were required for all residential lots 20,000 square feet or less. The amended regulations now require site development plans for *all lots in the East*. Most lots in the Rural West are larger than 20,000 square feet. Consequently, SDPs do not account for all residential growth in the County.

Similar to subdivision activity, site development plan activity has been compiled by the five planning areas. The number of residential site development plans approved, the number of non-residential lots approved, and the acreage of approved plans have been compiled for each of these areas and are discussed below. The analysis includes last year's site development plan activity as well as activity for the last five years.

Summary of Last Year's Results

Last year there were 1,607 housing units approved in 77 site development plans totaling about 359 acres (Table 12). Ellicott City had the most units approved with 733, or 46 percent of the total. The Southeast had 19 percent of the total with 312 approved units, followed by Columbia with 275 approved units and the Elkridge with 194 approved units. The Rural West had 93 units approved in site development plans.

Of the total 77 site development plans approved last year, 32 were in Ellicott City, followed by 26 in the Southeast, 10 in Columbia and 7 in Elkridge. The remaining 2 plans were in the Southeast.

Of the total 359 residential acres approved through site development plans, 146 acres, or 41 percent, were in Ellicott City. A total of 78 acres were approved in the Rural West, followed by 63 acres approved in the Southeast, 38 acres in Elkridge and 34 acres approved in Columbia.

Table 13 shows new units from approved site development plans by unit type. Of the 1,607 approved units, 709 were for single family detached units, 389 were for single family attached or townhouse units, and the remaining 509 were for apartment units. This represents 44 percent, 24 percent, and 32 percent of the total units, respectively. There were no mobile homes approved in site development plans last year. Chart 11 shows these results graphically.

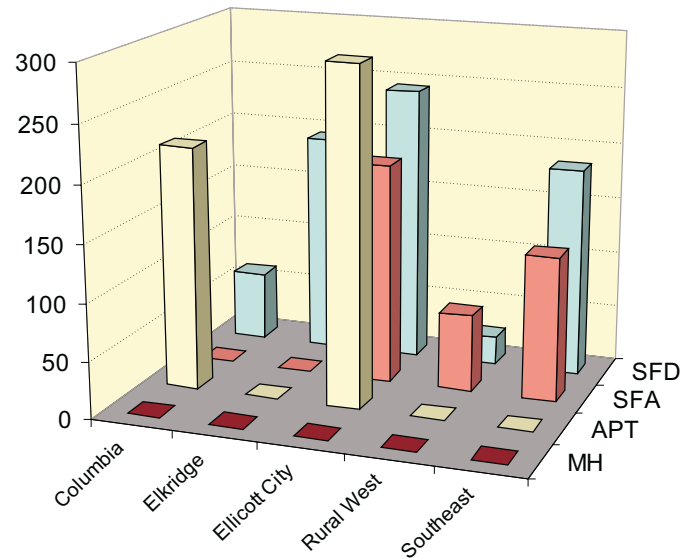
Table 12
Approved Residential Site Development Plans, 10/01/01 to 9/30/02

Planning Area	Units		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	275	17%	10	13%	34	9%
Elkridge	194	12%	7	9%	38	11%
Ellicott City	733	46%	32	42%	146	41%
Rural West	93	6%	2	3%	78	22%
Southeast	312	19%	26	34%	63	18%
TOTAL	1,607	100%	77	100%	359	100%

Table 13
Approved Units from SDP's by Unit Type, 10/01/01 to 9/30/02

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	61	0	214	0	275	17.1%
Elkridge	194	0	0	0	194	12.1%
Ellicott City	244	194	295	0	733	45.6%
Rural West	25	68	0	0	93	5.8%
Southeast	185	127	0	0	312	19.4%
TOTAL	709	389	509	0	1,607	100.0%
PERCENT	44%	24%	32%	0%	100%	

Chart 11
Units in Approved Site Development Plans
10/1/01 to 9/30/02



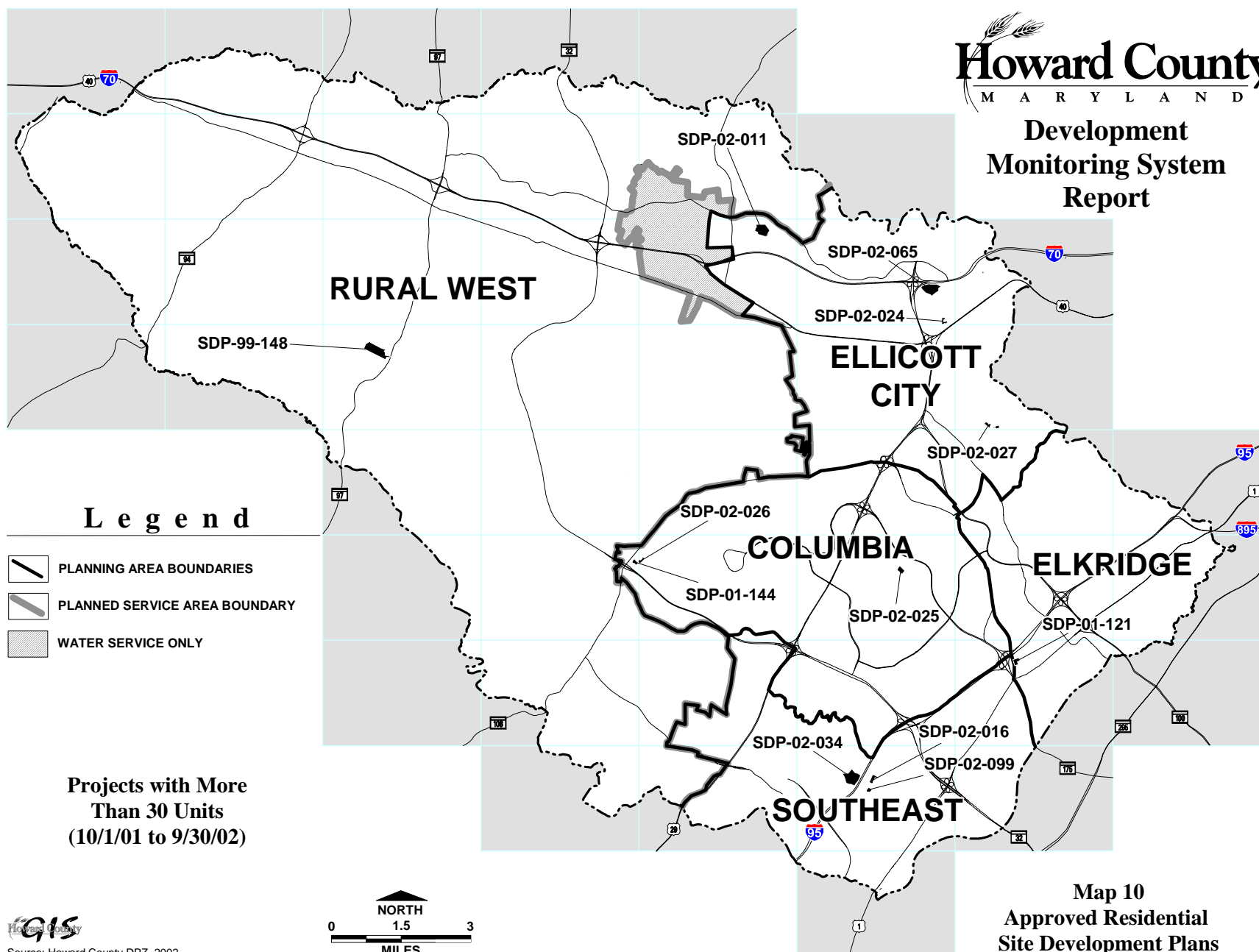
Last Year's Projects - Greater than 30 Units

Of the total 1,607 units approved in site development plans last year, 1,090 or about 68 percent were in site development plans consisting of more than 30 units. These larger projects, shown in Table 14, are located in all five planning areas. The location of these plans are shown on Map 10.

Of the 247 units in larger site plans approved in Columbia last year, 214 of them were apartment/condo units in River Hill, and the remaining 33 were SFD units in Eckers Hollow. In Elkridge, 111 units were approved as part of New Colony Village. In Ellicott City, 537 units were part of larger site development plans. These include SFD units in Waverly Woods and Worthington Fields, and SFA and apartment/condo units in Kaiser Farm and the Enclave at Ellicott Hills. The units for the Enclave are age restricted for active adults only. In the Rural West, there were 68 SFA units approved as part of the Villas of Cattail Creek, also an age restricted development. In the Southeast, a total of 127 SFA units were part of larger site development plans, two plans for Stone Lake and one plan for Emerson.

Table 14
Approved Residential SDP's, Projects With More Than 30 Units, 10/01/01 to 9/30/02

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Columbia	SDP-02-025	Eckers Hollow	SFD	33	247
	SDP-02-026	Village of River Hill	APT	106	
	SDP-01-144	Village of River Hill	APT	108	
Elkridge	SDP-01-121	New Colony Village - Phase VI	SFD	111	111
Ellicott City	SDP-02-011	Waverly Woods	SFD	33	537
	SDP-02-027	Worthington Fields	SFD	42	
	SDP-02-024	Kaiser Farm	SFA, APT	176	
	SDP-02-065	The Enclave at Ellicott Hills	SFA, APT - Age Restricted	286	
Rural West	SDP-99-148	Villas at Cattail Creek	SFA - Age Restricted	68	68
Southeast	SDP-02-099	Stone Lake	SFA	36	127
	SDP-02-016	Stone Lake	SFA	37	
	SDP-02-034	Emerson (Formerly R-ED West)	SFA	54	
TOTAL					1,090



Five Year Results

Table 15 shows the approved residential site development plans for the last five years from October 1, 1997 to September 30, 2002. Over this five year period 6,979 units were approved countywide in 351 site development plans totaling about 1,373 acres. This equates to a five year average of 1,396 units per year. The number of units approved last year, 1,607, was about 15 percent greater than this five year average.

Table 16 shows the approved units *by unit type* for each of the last five years. Over the five year period, 52 percent of the units were single family detached, 24 percent were single family attached and 24 percent were apartments. The five year totals are 3,637, 1,679 and 1,663 for single family detached, single family attached and apartment units, respectively. Chart 12 shows these results graphically.

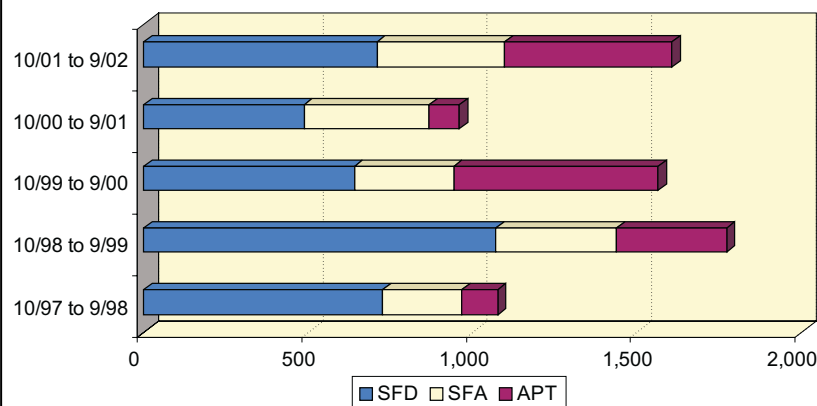
Table 15
Approved Residential Site Development Plans, 10/01/97 to 9/30/02

Year	Units	Plans	Acreage
10/97 to 9/98	1,076	68	235
10/98 to 9/99	1,772	89	368
10/99 to 9/00	1,565	56	233
10/00 to 9/01	959	61	178
10/01 to 9/02	1,607	77	359
TOTAL	6,979	351	1,373
5 YEAR AVG.	1,396	70	275

Table 16
Approved Units in Residential Site Development Plans, 10/01/97 to 9/30/02

Year	SFD	SFA	APT	MH	Total
10/97 to 9/98	727	241	108	0	1,076
10/98 to 9/99	1,072	367	333	0	1,772
10/99 to 9/00	641	302	622	0	1,565
10/00 to 9/01	488	380	91	0	959
10/01 to 9/02	709	389	509	0	1,607
TOTAL	3,637	1,679	1,663	0	6,979
PERCENT	52%	24%	24%	0%	100%
5 YEAR AVG.	727	336	333	0	1,396

Chart 12
Housing Units in Approved SDP's, 10/1/97 to 9/30/02



In Process Residential Site Development Plans

This section summarizes residential site development plans in process. The number of *plans*, potential *units* and *acreage* currently being processed as of September 30, 2002 are tabulated and compared to those in process a year earlier (as of September 30, 2001).

As indicated earlier, large residential lots 20,000 square feet or larger in the Rural West do not require site development plans. Therefore, the tables shown in this section would not include most units proposed in the West.

Number of Plans

There were more residential site development plans in process as of September 30, 2002 compared to one year earlier, 47 plans compared to 30 plans (Table 17).

As of September 30, 2002, Ellicott City had 20 plans in process, followed by Elkridge with 14, the Southeast with 10 and Columbia with 2. There was only one plan in process in the Rural West, Homeland, an age-restricted development permitted as a conditional use.

Table 17
Number of Residential SDP's In Process, 09/30/01 & 09/30/02

Planning Area	2002	2001
Columbia	2	4
Elkridge	14	6
Ellicott City	20	13
Rural West	1	2
Southeast	10	5
TOTAL	47	30

Number of Potential Units

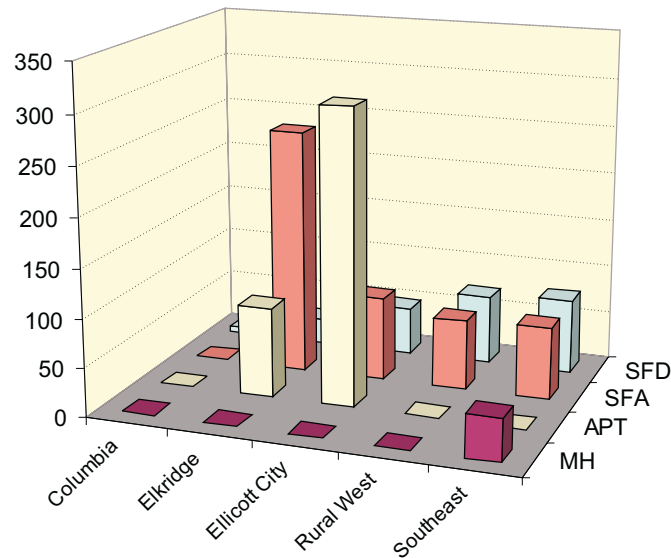
There were also more potential units in process as of September 30, 2002 compared to a year earlier, 1,151 units compared to 1,065 units (Table 18). Ellicott City had the largest number of units in process in 2002 with 437, 38 percent of the countywide total. This is followed by Elkridge and the Southeast with 370 (32 percent) and 194 (17 percent) units in process, respectively. The Rural West had 143 units in process as of September 30, 2002 followed by only 7 units in Columbia.

As indicated in Table 18, the greatest number of units in process are for single family attached with 484 proposed units in 2002. This is followed by 394 proposed apartment units. There were 230 proposed single family detached units and 43 mobile homes. Chart 13 graphically illustrates the units in process by unit type for the current year. (As indicated earlier, large residential lots 20,000 square feet or larger do not require site development plans. Therefore, the table and chart would not include most units proposed in the West.)

Table 18
Number of Potential Units from Site Development Plans in Process, 09/30/02
(With comparisons to Countywide total as of 09/30/01)

Planning Area	Single Family Detached	Single Family Attached	Apartments	Mobile Homes	TOTAL UNITS
Columbia	7	0	0	0	7
Elkridge	26	252	92	0	370
Ellicott City	49	86	302	0	437
Rural West	71	72	0	0	143
Southeast	77	74	0	43	194
TOTAL	230	484	394	43	1,151
As of 09/30/01	459	223	340	43	1,065

Chart 13
SDP's in Process - New Unit Potential
9/30/02



The greatest amount of in process acreage was in Ellicott City, with 82 acres. There were 76 acres in process in Elkridge, 70 acres in the Rural West, 38 acres in the Southeast and 2 acres in Columbia.

Major Projects

Table 20 shows a list of potential units from larger projects with 30 units or more. Map 11 shows the location of these projects. Of the 1,151 units in the site development plan process, 897 or about 78 percent were in projects with 30 units or more.

Ellicott City had 353 units in process as part of larger projects, followed by Elkridge with 284, the Rural West with 143 and the Southeast with 117. Larger projects in Ellicott City include apartments and townhouses in the age restricted developments of the Courtyards at Ellicott Mills and Village Crest. Larger projects in Elkridge include 92 age restricted units in the Courtyards at the Timbers as well as 192 SFA units in the Oaks at Waters Edge development. Large projects in the Southeast include 43 mobile homes in Brentwood Manor and 74 SFA units in Cherrytree Park. As mentioned earlier, there were also 143 SFA and SFD age-restricted units in process in the Rural West as part of the Homeland development.

Number of Acres

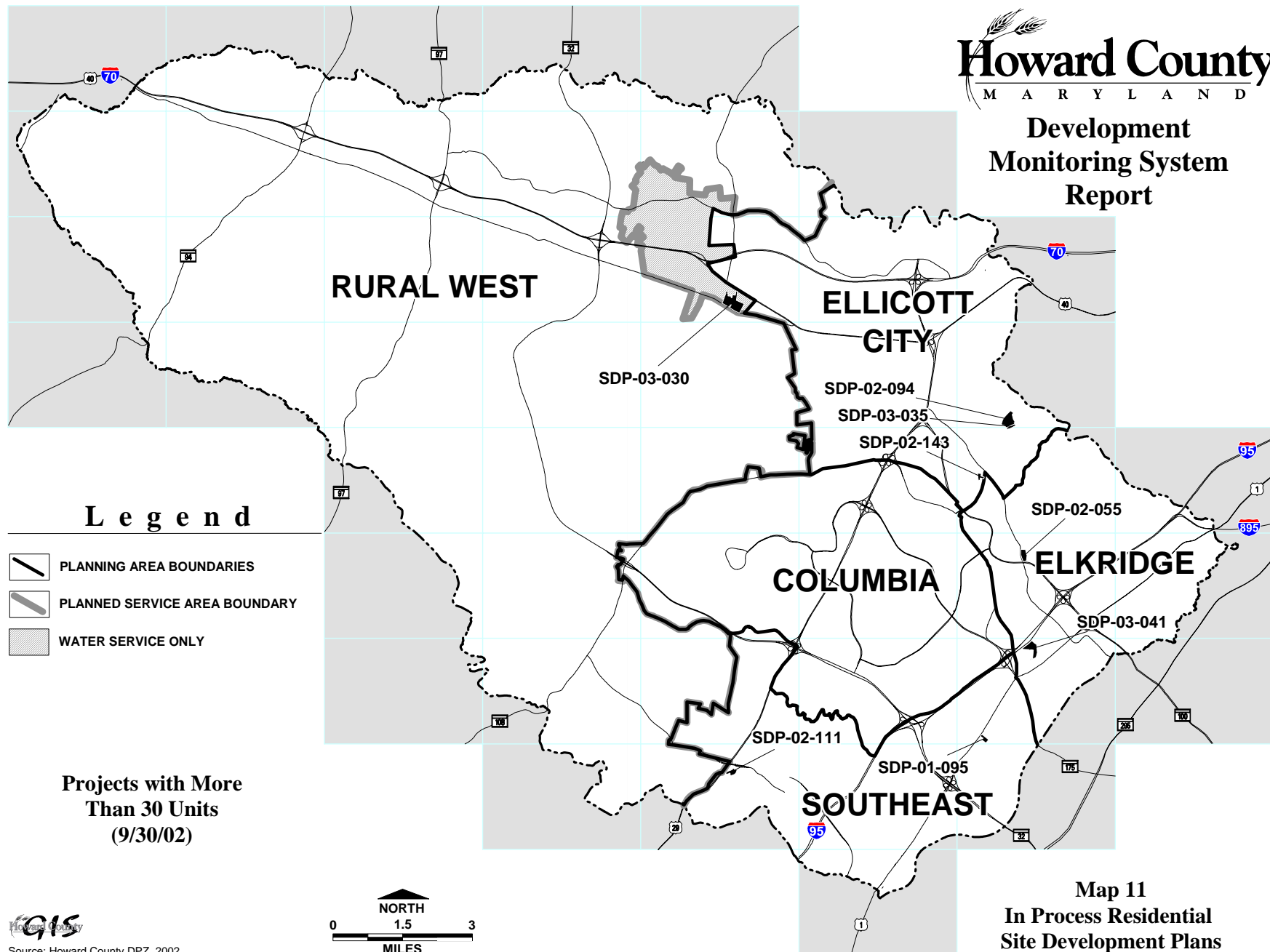
As of September 30, 2002 a total of 268 acres of residential land were in the site development plan process. This is 52 acres more than the previous year, at which time there were 216 acres in process (Table 19).

Table 19
Acreage of Residential SDP's In Process, 09/30/02

Planning Area	2002	2001
Columbia	2	24
Elkridge	76	36
Ellicott City	82	58
Rural West	70	78
Southeast	38	20
TOTAL	268	216

Table 20
In Process Residential Site Development Plans, Projects With More Than 30 Units, 9/30/02

Region	File Number	Plan Name	Unit Type	Units	TOTAL
Elkridge	SDP-02-055	The Courtyards at the Timbers	APT - Age Restricted	92	284
	SDP-03-041	The Oaks at Waters Edge	SFA	192	
Ellicott City	SDP-02-143	The Courtyards at Ellicott Mills	SFA - Age Restricted	35	353
	SDP-03-035	Village Crest	SFA - Age Restricted	51	
	SDP-02-094	Village Crest	APT - Age Restricted	267	
Southeast	SDP-01-095	Brentwood Manor Expansion	MH	43	117
	SDP-02-111	Cherrytree Park	SFA	74	
Rural West	SDP-03-030	Homeland	SFD, SFA - Age Restricted	143	143
TOTAL					897



Residential Building Permits & Use and Occupancy Permits

The final stage of the development process is the issuance of building permits. In Howard County, building permits are required for all construction. This section of the report tabulates building permits for all new residential construction. Once construction is complete and prior to residents moving in, use and occupancy permits are required. These are also tabulated and discussed further below. Both building permits and use and occupancy permits have been compiled by the five planning areas.

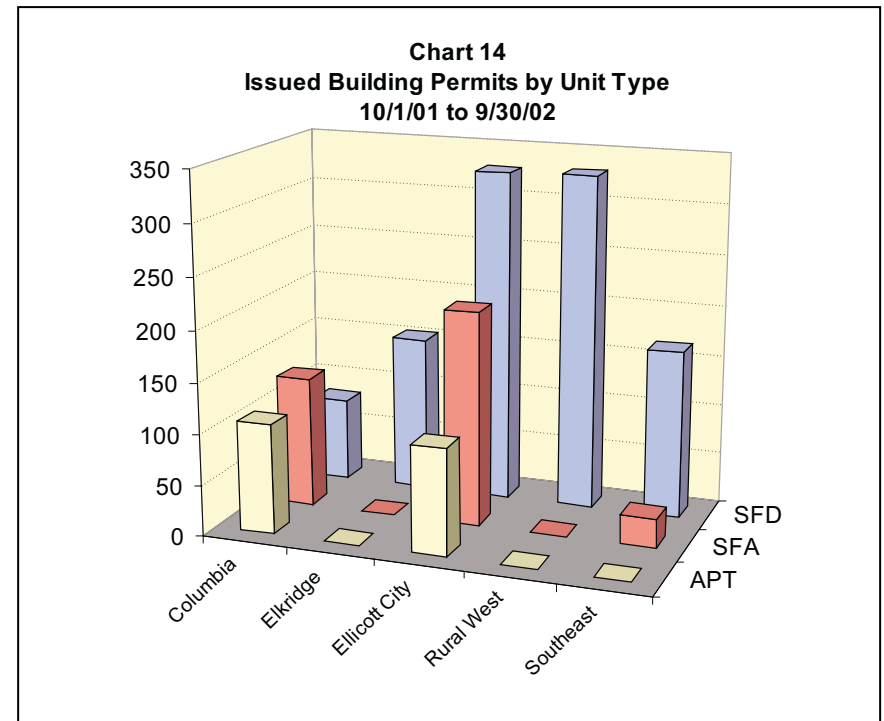
Issued Building Permits

Summary of Last Year's Results

Last year from October 1, 2001 to September 30, 2002, the County issued 1,642 residential building permits for new construction (Table 21). Of all planning areas, Ellicott City had the most building permits issued with 644, 39 percent of the total. The Rural West had 330 issued permits (20%) and the Columbia had 319 issued permits (19%). There were 195 issued permits in the Southeast (12%) and 154 in Elkrigde (9%).

Countywide, 65 percent of the permits were for single family detached units. About 22 percent were for SFA units and 13 percent for apartment units. The greatest number of SFD units were in the Rural West. No permits for mobile homes were issued last year. Chart 14 shows these results graphically by planning area.

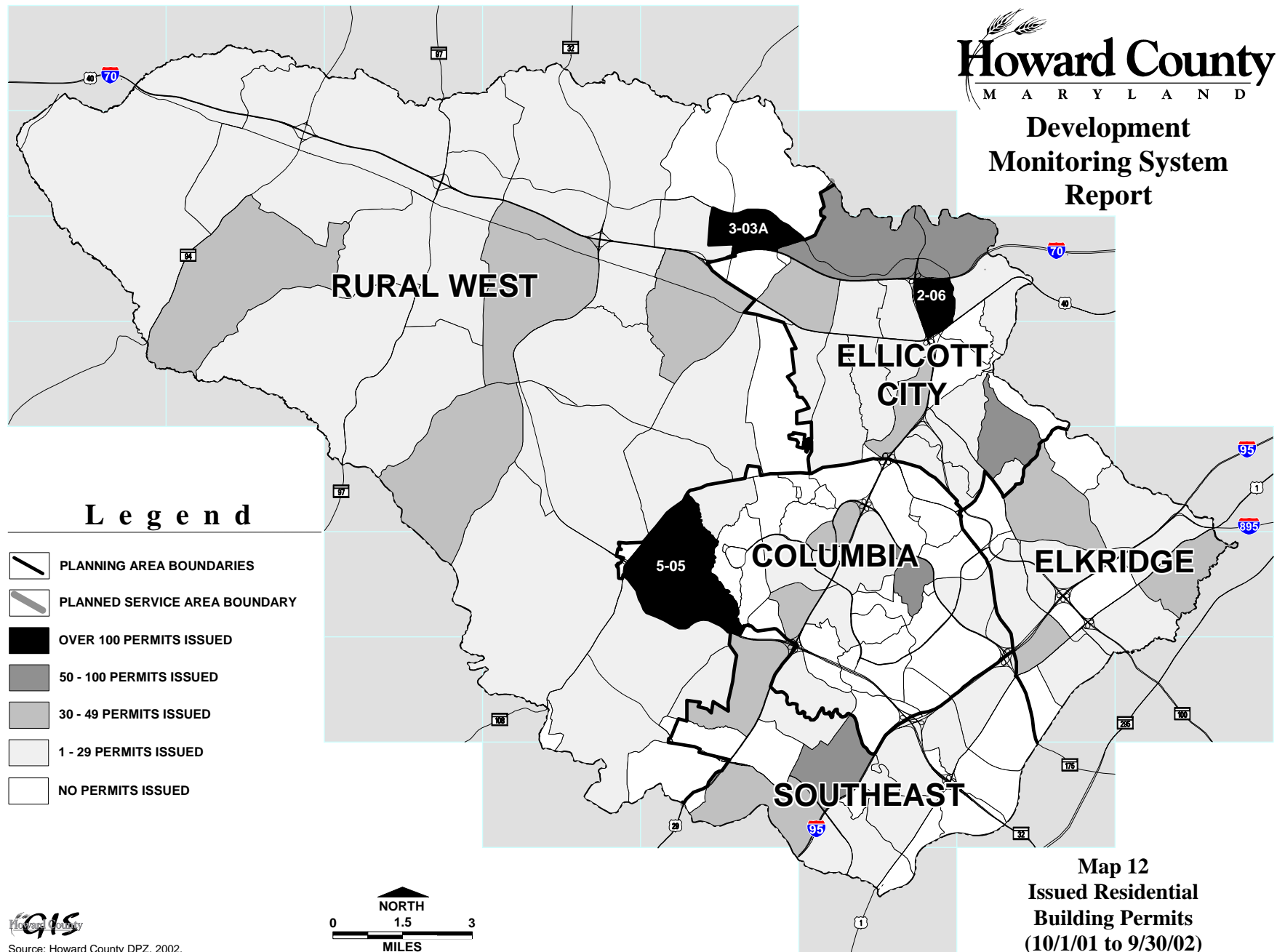
Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	82	129	108	0	319	19%
Elkrigde	154	0	0	0	154	9%
Ellicott City	328	211	105	0	644	39%
Rural West	330	0	0	0	330	20%
Southeast	166	29	0	0	195	12%
TOTAL	1,060	369	213	0	1,642	100%
PERCENT	65%	22%	13%	0%	100%	



Map 12 shows the building permit activity by statistical area of the County. Statistical areas 5-05, 3-03A and 2-06 each had more than 100 permits issued. These are the areas containing River Hill, Waverly Woods and Kaiser Farm. Of these three areas, statistical area 3-03A had the greatest number with 190 issued permits. Statistical area 5-05 had 178 issued permits and stat area 2-06 had 105 issued permits.

Last Year's Projects - Greater Than 30 Units

Table 22 summarizes the issued residential building permits in larger subdivisions with more than 30 units. About 55 percent, or 895 of the total 1,642 permits issued last year, fall into this category. Map 13 shows the locations of each of the subdivisions.



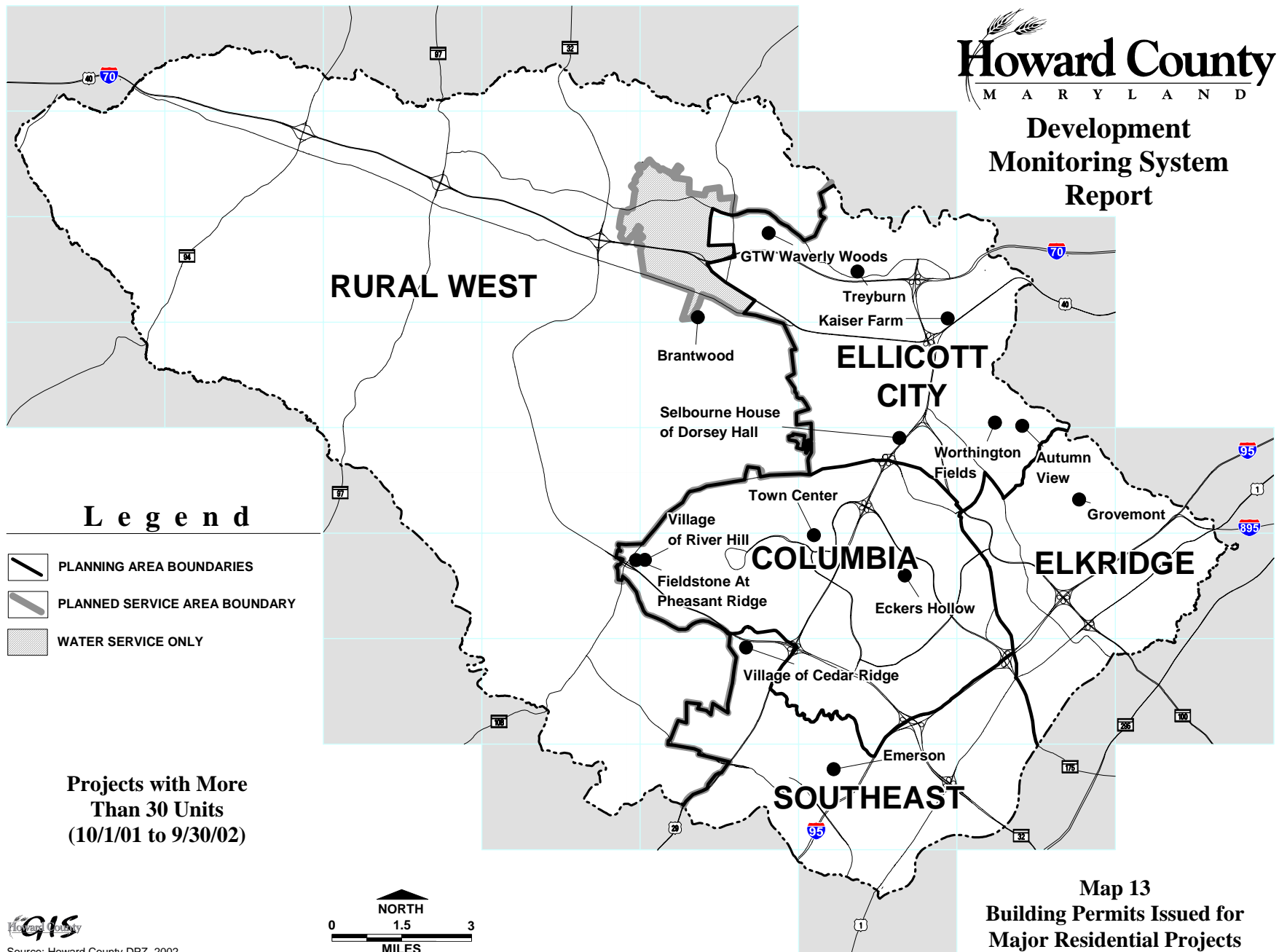


Table 22
Issued Residential Building Permits in
Subdivisions With More Than 30 Units, 10/01/01 to 9/30/02

Subdivision	Planning Area	Type	Units	TOTAL
Fieldstone At Pheasant	Columbia	APT	81	129
Selbourne House of Dorsey Hall	Ellicott City	APT	48	
GTW Waverly Woods	Ellicott City	SFA	180	405
Village of River Hill	Columbia	SFA	95	
Kaiser Farm	Ellicott City	SFA	92	
Town Center	Columbia	SFA	38	
Eckers Hollow	Columbia	SFD	58	
Emerson	Southeast	SFD	55	361
Treyburn	Ellicott City	SFD	51	
Autumn View	Ellicott City	SFD	48	
Village of Cedar Ridge	Southeast	SFD	41	
Worthington Fields	Ellicott City	SFD	39	
Grovermont	Elkridge	SFD	37	
Brantwood	Rural West	SFD	32	
TOTAL				895

Five Year Results

Over five years, from October 1, 1997 to September 30, 2002, a total of 10,229 residential building permits have been issued in Howard County (Table 23). This is an average of about 2,046 permits per year. The five year trends indicate an increase in the number of issued permits each year from 2,281 in 96/97 to a high of 2,418 in 99/00 before a significant drop to

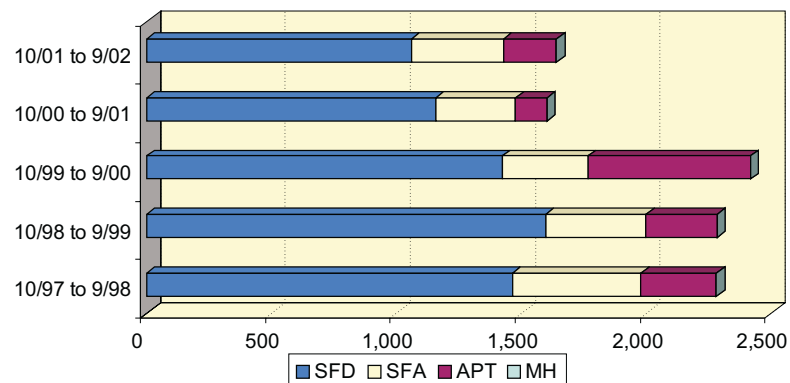
Table 23
Issued Residential Building Permits by Unit Type, 10/01/97 to 9/30/02

Year	SFD	SFA	APT	MH	Total
10/97 to 9/98	1,465	515	301	0	2,281
10/98 to 9/99	1,600	400	284	0	2,284
10/99 to 9/00	1,425	342	651	0	2,418
10/00 to 9/01	1,158	320	126	0	1,604
10/01 to 9/02	1,060	369	213	0	1,642
TOTAL	6,708	1,946	1,575	0	10,229
PERCENT	66%	19%	15%	0%	100%
5 YEAR AVG.	1,342	389	315	0	2,046

only 1,604 issued permits in 00/01. Last year wasn't much greater with only 1,642 permits issued. This is a 47 percent decrease from the high in 99/00.

Of the 10,229 total permits issued over five years, 6,694, or 65 percent, were for single family detached units. There were 1,960 permits (19 percent) for single family attached units, 1,575 permits (15 percent) for apartment units and no permits for mobile homes. Chart 15 shows the results by unit type graphically over time.

Chart 15
Issued Building Permits by Unit Type
10/1/97 to 9/30/02



Use and Occupancy Permits

Summary of Last Year's Results

Last year from October 1, 2001 to September 30, 2002, the County issued 1,951 use and occupancy permits (Table 24). Of all planning areas, Columbia had the most with 752, 39 percent of the total. This is followed by Ellicott City with 528 issued use and occupancy permits. The Rural West had 353 issued permits, followed by Elkridge and the Southeast with 204 and 114 issued permits, respectively. Chart 16 shows these results graphically.

Table 24
Issued Use and Occupancy Permits by Unit Type, 10/01/01 to 9/30/02

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	131	174	447	0	752	39%
Elkridge	188	16	0	0	204	10%
Ellicott City	230	172	126	0	528	27%
Rural West	353	0	0	0	353	18%
Southeast	109	5	0	0	114	6%
TOTAL	1,011	367	573	0	1,951	100%
PERCENT	52%	19%	29%	0%		

Countywide, 52 percent of the permits were for single family units. About 19 percent were for single family attached units and 29 percent were for apartment units. No permits for mobile homes were issued last year.

Five Year Results

Over five years, from October 1, 1997 to September 30, 2002, a total of 10,373 use and occupancy permits have been issued in Howard County (Table 25). This is an average of about 2,075 permits per year.

Of the 10,373 total permits issued over five years, 6,673, or 64 percent, were for single family detached units. There were 2,077 permits (20 percent) for single family attached units, 1,616 permits (16 percent) for apartment units and 7 permits for mobile homes. Chart 17 shows the results by unit type graphically over time.

The number of issued permits increased each year from 1996/97 until 99/00 when they dropped to 1,904 from a high of 2,494 the year before. This drop occurred for all unit types – single family detached, single family attached and apartment units. Last year the number of issued use and occupancy permits increased slightly from this low to 1,951. However, the number of single family detached permits decreased significantly from 1,346 to 1,011. SFA permits decreased slightly, although apartment permits increased significantly from 179 to 573.

Chart 16
Issued Use & Occup. Permits by Unit Type
10/1/01 to 9/30/02

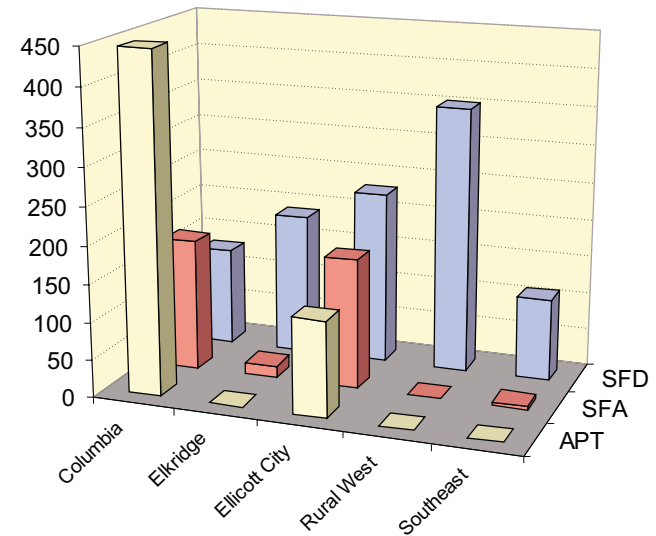
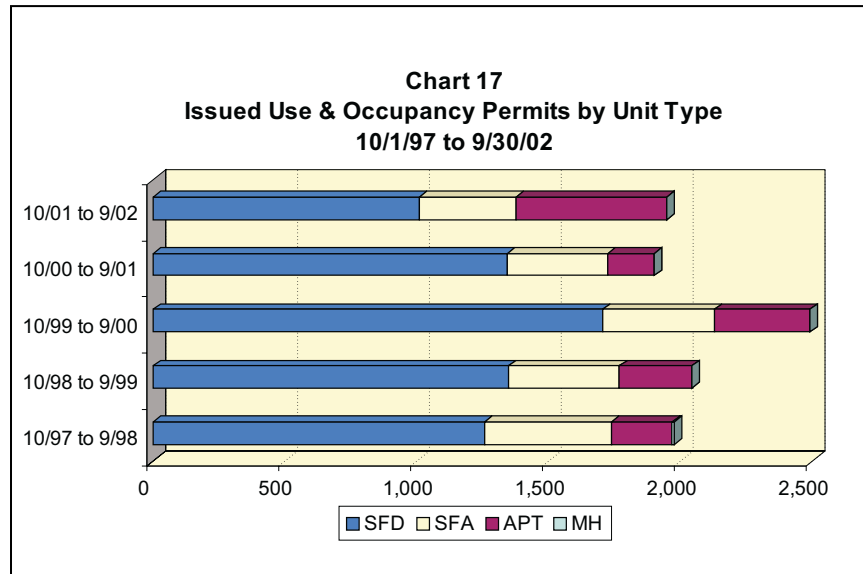


Table 25
Issued Use and Occupancy Permits by Unit Type, 10/01/97 to 9/30/02

Year	SFD	SFA	APT	MH	Total
10/97 to 9/98	1,258	484	230	7	1,979
10/98 to 9/99	1,350	422	273	0	2,045
10/99 to 9/00	1,708	425	361	0	2,494
10/00 to 9/01	1,346	379	179	0	1,904
10/01 to 9/02	1,011	367	573	0	1,951
TOTAL	6,673	2,077	1,616	7	10,373
PERCENT	64%	20%	16%	0%	100%
5 YEAR AVE.	1,335	415	323	1	2,075



Housing Unit Allocations

Subdivision applications submitted after April 10, 1992 are subject to the Adequate Public Facilities Ordinance (APFO) and require housing unit allocations. The typical time period between initial subdivision submission and occupancy is three years. Consequently, plan approvals after the chart adoption in 2002 are granted allocations for the 2005 allocation year. Some submissions contain phasing over several years and are granted allocations for future years, if available. The number of allocations available is established annually by County Council resolution. The allocation chart is based on the General Plan growth projections by planning area. Depending upon zoning and plan type, *tentative allocations* are usually assigned upon sketch plan approval. Allocations become *permanent* upon final plat recordation.

In accordance with APFO, since the 1997 allocation year (1994 plan submission year), the allocations have been adjusted to reflect regional development activity using a “rolling average.” The intent of the rolling average is to provide a means to annually adjust the allocation chart to achieve the overall General Plan targets. The rolling average formula uses: 1) the number of allocations granted, 2) the number of lots recorded in projects that were exempt from APFO, and 3) the General Plan target.

Table 26 is the current allocation chart, which the County Council adopted July 1, 2002. Total allocations are shown by the five planning areas in ad-

dition to a Senior East overlay area. Senior east allocations are dedicated to age restricted housing in the eastern part of the County (consisting of all planning areas except the Rural West). These new planning areas are consistent with General Plan projections and the amended Adequate Public Facilities Ordinance. Refer to the maps shown earlier in this report for an outline of the five planning areas. From the July 1, 2002 chart adoption until the next chart adoption (planned for July 2003), the Department of Planning and Zoning may assign year 2005 allocations.

As allowed under APFO, to provide some flexibility, up to 20 percent more allocations than available can be granted in each planning area for the 2005 allocation year. If this is utilized and more allocations are granted than available for the current allocation year, then available allocations in future years are reduced based on the rolling average. Consequently, areas with strong demand show a decrease in available allocations over time. On the other hand, for areas that do not have strong demand available allocations increase over time.

As of October 24, 2002, 845 allocations had been granted for the 2005 Allocation Year (Table 27). Three planning areas -- Elkridge, the Southeast and the Rural West -- all available allocations have been granted including the extra 20 percent. All additional projects in these planning areas are therefore placed in the waiting bin. As of October 24, all the other areas

Table 26
Housing Unit Allocation Chart, Adopted July 1, 2002

Planning Area	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Columbia	654	487	375	220	220	220	158	158	158	158
Elkridge	91	119	136	130	130	130	164	164	164	164
Ellicott City	236	325	326	348	348	348	358	358	358	358
Southeast	183	232	288	302	302	302	320	320	320	320
Rural West	192	193	199	250	250	250	250	250	250	250
Senior East	268	268	269	250	250	250	250	250	250	250
TOTAL	1,624	1,624	1,593	1,500	1,500	1,500	1,500	1,500	1,500	1,500

still had available capacity.

Comprehensive and phased subdivisions may request and receive allocations for future years. As of October 24, 2002 a total of 1,901 allocations have been granted for future years (Table 28). These future year allocations have been given to the following subdivisions: Autumn River, Mount Joy Farm, Worthington Fields and Waverly in the Ellicott City; Cherry Tree Park, Emerson and Maple Lawn Farms in the Southeast; Owens Property in Elkridge; and Riverwood in the Rural West.

Table 27
Housing Unit Allocations, 2005 Allocation Year

Planning Area	Possible Allocations		Allocations Granted ¹	Remaining Available
	2005	+ 20%		
Columbia	654	785	2	783
Elkridge	91	109	109	0
Ellicott City	236	283	170	113
Southeast ²	183	220	332	(112)
Rural West	192	230	230	0
Senior East	268	322	2	320
TOTAL	1,624	1,949	845	1,104

1. As of October 24, 2002

2. More allocations were given out than available in the Southeast in 2005 because previously phased projects were granted allocations prior to the adoption of the 2000 General Plan, which reduced future units. The rolling average provision in the APF Act will adjust future year allocations down over time to compensate.

Table 28
Granted Allocations for Future Years¹

Planning Area	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	TOTAL
Columbia	0	0	0	0	0	0	0	0	0	0	0
Elkridge	55	0	0	0	0	0	0	0	0	0	55
Ellicott City	47	60	60	103	113	0	0	0	0	0	383
Southeast	294	290	240	105	150	100	75	75	45	41	1,415
Rural West	48	0	0	0	0	0	0	0	0	0	48
Senior East	0	0	0	0	0	0	0	0	0	0	0
TOTAL	444	350	300	208	263	100	75	75	45	41	1,901

1. As of October 24, 2002

Potential Population

Table 29 shows the most recent household size estimates by unit type from the 2000 Census. They are also used for purposes of this analysis.

Table 29 Household Size by Dwelling Unit Type				
Year	SFD	SFA	APT	MH
2000 Census Estimates	3.11	2.59	1.89	2.50

The development pipeline can be analyzed to project expected population growth from new development. As development progresses throughout the process, more exact population estimates based on dwelling unit type are possible. For this report, annual population growth has been estimated from potential housing units at three development stages: 1) recorded subdivisions, 2) issued building permits, and 3) issued use and occupancy permits. Table 30 summarizes the estimated population results from new growth for last year as well as the five year average.

Table 30 Comparison of Housing and Population Estimates				
Category	10/01 to 9/02		10/97 to 9/02 (Annual Ave.)	
	Housing Units	Population	Housing Units	Population
Recorded Lots	1,143	3,326	1,060	3,119
Building Permits	1,642	4,650	2,046	5,770
U & O Permits	1,951	5,172	2,075	5,835

Based on recorded lots last year from October 1, 2001 to September 30, 2002, there is potential for 3,326 new residents. This compares to a potential population of 4,650 based on the number of issued building permits and an estimated population of 5,172 based on use and occupancy permits issued during the same one year time period.

Over the five year period from October 1, 1997 to September 30, 2002, average annual population growth based on recorded lots is 3,119. Population growth based on the number of issued building permits and use and occupancy permits amounts to 5,770 and 5,835 per year, respectively. More detailed results for each development category are discussed in the sections below.

As indicated earlier in this report, not all potential units go through the subdivision process, so building permits and use & occupancy permits are a more accurate measure of population growth.

Population Estimates from Recorded Subdivisions

Table 31 shows the potential population from recorded lots by unit type and by region for the 10/01 to 9/02 one year time period. Of the 3,326 potential new residents 66 percent will reside in single family detached units and 34 percent in single family attached units. About 64 percent will live in the Southeast, 12 percent each in the Rural West and Ellicott City, 10 percent in Elkridge and 2 percent in Columbia.

Table 31 Potential Population from Recorded Lots, 10/01/01 to 9/30/02						
Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	71	0	0	0	71	2%
Elkridge	329	0	0	0	329	10%
Ellicott City	407	0	0	0	407	12%
Rural West	385	0	0	0	385	12%
Southeast	1,013	1,119	0	0	2,132	64%
TOTAL	2,206	1,119	0	0	3,326	100%
PERCENT	66%	34%	0%	0%	100%	

For the five years since October 1, 1997, there has been a potential of 5,301 residential units from recorded lots. This averages 1,060 new units per year. Using the household size estimates discussed above for each unit

type, an estimated 15,595 new residents could live in those units (Table 32). This results in an average population growth rate of 3,119 new residents per year.

Of the total 15,595 residents, 79 percent of the total population would reside in single family detached units. About 18 percent would live in single family attached units and 3 percent in apartment units.

Table 32
Potential Population from Recorded Lots, 10/01/97 to 9/30/02

Year	SFD	SFA	APT	MH	Total
10/97 to 9/98	2,377	158	296	0	2,831
10/98 to 9/99	4,006	269	0	0	4,274
10/99 to 9/00	1,563	747	0	0	2,310
10/00 to 9/01	2,157	512	185	0	2,853
10/01 to 9/02	2,206	1,119	0	0	3,326
TOTAL	12,309	2,805	481	0	15,595
PERCENT	79%	18%	3%	0%	100%
5 YEAR AVE.	2,462	561	96	0	3,119

Population Estimates from Issued Building Permits

Building permits are generally a more timely and accurate indicator of potential population than recorded lots in subdivision plans. Table 33 shows the potential population from building permits by type and by region for the 10/01 to 9/02 one year time period. Of the 4,650 new residents 71 percent would reside in single family detached units, 21 percent in single family attached units and 9 percent in apartment units. About 38 percent are located in Ellicott City, 22 percent in the Rural West, 17 percent in Columbia, 13 percent in the Southeast and 10 percent in Elkrigde.

For the five years since October 1, 1997, 10,229 building permits for new residential units have been issued. This averages 2,046 permits per year. Using the household size estimates discussed earlier for each unit type, an estimated 28,849 new residents would live in those units (Tables 34).

Table 33
Potential Population from Building Permits, 10/01/01 to 9/30/02

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	255	334	204	0	792	17%
Elkrigde	479	0	0	0	479	10%
Ellicott City	1,019	545	198	0	1,763	38%
Rural West	1,025	0	0	0	1,025	22%
Southeast	516	75	0	0	591	13%
TOTAL	3,294	954	402	0	4,650	100%
PERCENT	71%	21%	9%	0%	100%	

Of the total 28,849 residents, 72 percent of the total population would reside in single family detached units. About 17 percent would live in single family attached units and 10 percent in apartments.

Table 34
Potential Population from Building Permits, 10/01/97 to 9/30/02

Year	SFD	SFA	APT	MH	Total
10/97 to 9/98	4,552	1,331	568	0	6,452
10/98 to 9/99	4,972	1,034	536	0	6,542
10/99 to 9/00	4,428	884	1,229	0	6,541
10/00 to 9/01	3,598	827	238	0	4,664
10/01 to 9/02	3,294	954	402	0	4,650
TOTAL	20,845	5,031	2,973	0	28,849
PERCENT	72%	17%	10%	0%	100%
5 YEAR AVE.	4,169	1,006	595	0	5,770

Population Estimated from Use and Occupancy Permits

Use and occupancy permits are the most accurate and immediate predictor of new population. A use and occupancy permit is issued upon completion of a residential unit and is required prior to residents moving in.

Table 35 shows the potential population from use and occupancy permits

by type and by region for the 10/01 to 9/02 one year time period. Of the estimated 5,172 new residents 61 percent live in single family detached units, 18 percent in single family attached units and 21 percent in apartment units. About 33 percent live in Columbia, 27 percent in Ellicott City, 21 percent in the Rural West, 12 percent in Elkridge and 7 percent in the Southeast.

For the five years since October 1, 1997, there have been 10,373 use and occupancy permits issued. This averages 2,075 per year. Using the household size estimate discussed above, an estimated 29,174 new residents would live in those units (Table 36).

Of the total 29,174 new residents, about 71 percent of the total would reside in single family detached units. About 18 percent would live in single family attached units, 11 percent in apartments and less than 1 percent in mobile homes.

Table 35
Potential Population from Use & Occupancy Permits, 10/01/01 to 9/30/02

Planning Area	SFD	SFA	APT	MH	TOTAL	PERCENT
Columbia	407	450	844	0	1,701	33%
Elkridge	584	41	0	0	626	12%
Ellicott City	715	445	238	0	1,397	27%
Rural West	1,097	0	0	0	1,097	21%
Southeast	339	13	0	0	352	7%
TOTAL	3,142	949	1,082	0	5,172	100%
PERCENT	61%	18%	21%	0%	100%	

Table 36
Potential Population from Use & Occupancy Permits, 10/01/97 to 9/30/02

Year	SFD	SFA	APT	MH	Total
10/96 to 9/97	3,909	1,251	434	18	5,612
10/97 to 9/98	4,195	1,091	515	0	5,801
10/98 to 9/99	5,308	1,099	681	0	7,088
10/99 to 9/00	4,183	980	338	0	5,500
10/00 to 9/01	3,142	949	1,082	0	5,172
TOTAL	20,736	5,370	3,050	18	29,174
PERCENT	71.1%	18.4%	10.5%	0.1%	100%
5 YEAR AVE.	4,147	1,074	610	4	5,835

Housing Sales

The Department of Planning and Zoning receives monthly updates of all recorded property transfers from the State. These reports are edited and used to create a database of housing sales. For this report, the most recent data from October 1, 2001 to September 30, 2002 have been analyzed and tabulated by unit type. Housing sales from the previous four reporting periods are also shown for comparison purposes (Table 37). The data is graphically represented in Charts 18, 19, and 20.

The cost of housing in Howard County has been increasing steadily, from a mean sales price of \$201,698 in 97/98 to \$257,946 last year for all housing types combined. This is an overall increase of 27.9 percent over the four year time period and an average annual increase of 6.3 percent.

Most of this increase is reflected in the cost of single family detached homes, with the mean price increasing by about \$100,000 from \$248,800 four years ago to \$348,300 last year, a 40 percent increase. About one-third of this increase has occurred in the last year alone and almost 60 percent of the increase has occurred in the last two years.

Table 37
Housing Sales by Type, 10/01/97 to 9/30/02

10/97 to 9/98				10/98 to 9/99			
Unit Type	# of Sales	Mean	Median	Unit Type	# of Sales	Mean	Median
Condo	320	\$86,827	\$82,000	Condo	492	\$113,137	\$110,107
MH	3	\$67,966	\$68,000	MF	0	\$0	\$0
SFA	1,661	\$139,254	\$136,000	SFA	1,643	\$140,356	\$136,000
SFD	2,991	\$248,800	\$234,407	SFD	2,896	\$257,305	\$235,452
TOTAL	4,975	\$201,698		TOTAL	5,031	\$205,013	

10/99 to 9/00				10/00 to 9/01			
Unit Type	# of Sales	Mean	Median	Unit Type	# of Sales	Mean	Median
Condo	432	\$100,702	\$89,900	Condo	576	\$103,835	\$89,900
MH	1	\$79,900	\$79,900	MH	7	\$90,629	\$88,500
SFA	1,758	\$145,863	\$139,900	SFA	2,006	\$161,115	\$155,000
SFD	3,010	\$291,510	\$276,418	SFD	2,889	\$315,499	\$294,990
TOTAL	5,201	\$226,390		TOTAL	5,478	\$236,421	

10/01 to 9/02			
Unit Type	# of Sales	Mean	Median
Condo	742	\$112,671	\$100,000
MH	5	\$57,879	\$63,000
SFA	2,355	\$183,382	\$176,500
SFD	3,146	\$348,344	\$325,000
TOTAL	6,248	\$257,946	

For single family attached units there has been about a 32 percent increase in the mean sales price over the four year time period. More than half of this increase has occurred in the last year alone. Condominiums have increase by 30 percent over the four years.

During this period the number of annual sales have also increased each year, from 4,975 sales in 97/98 to 6,248 sales in 01/02, a 26 percent increase. These data reflect both new and existing units combined.

Nationally and regionally, the housing market has been strong over the last several years. Howard County is no exception. For Howard County in particular, it has been indicated by local builders and real estate agents that recent demand has exceeded supply, which has significantly contributed to the price increases. Low mortgage rates have also contributed.

Map 14 shows the housing sales by zip code in the County. Both the number of sales and the mean sales prices are shown.

Chart 18
Mean Sales Price by Unit Type

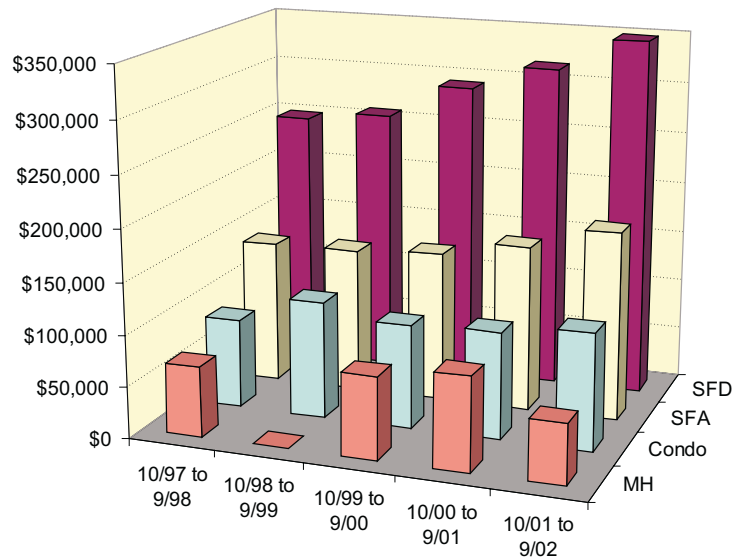


Chart 19
Median Sales Price by Unit Type

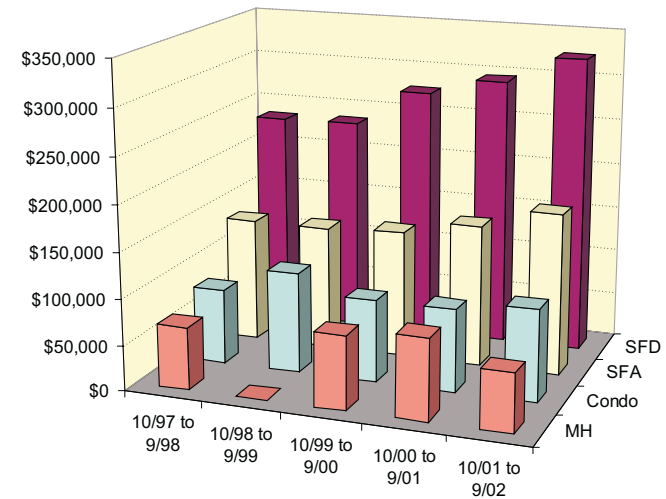
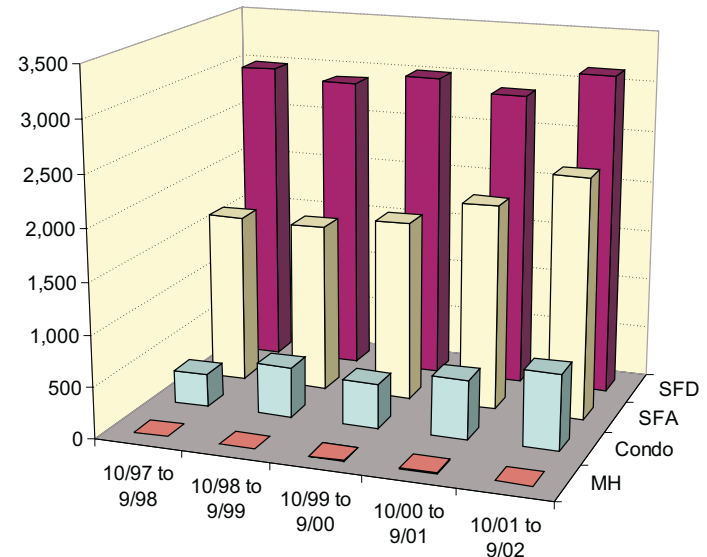
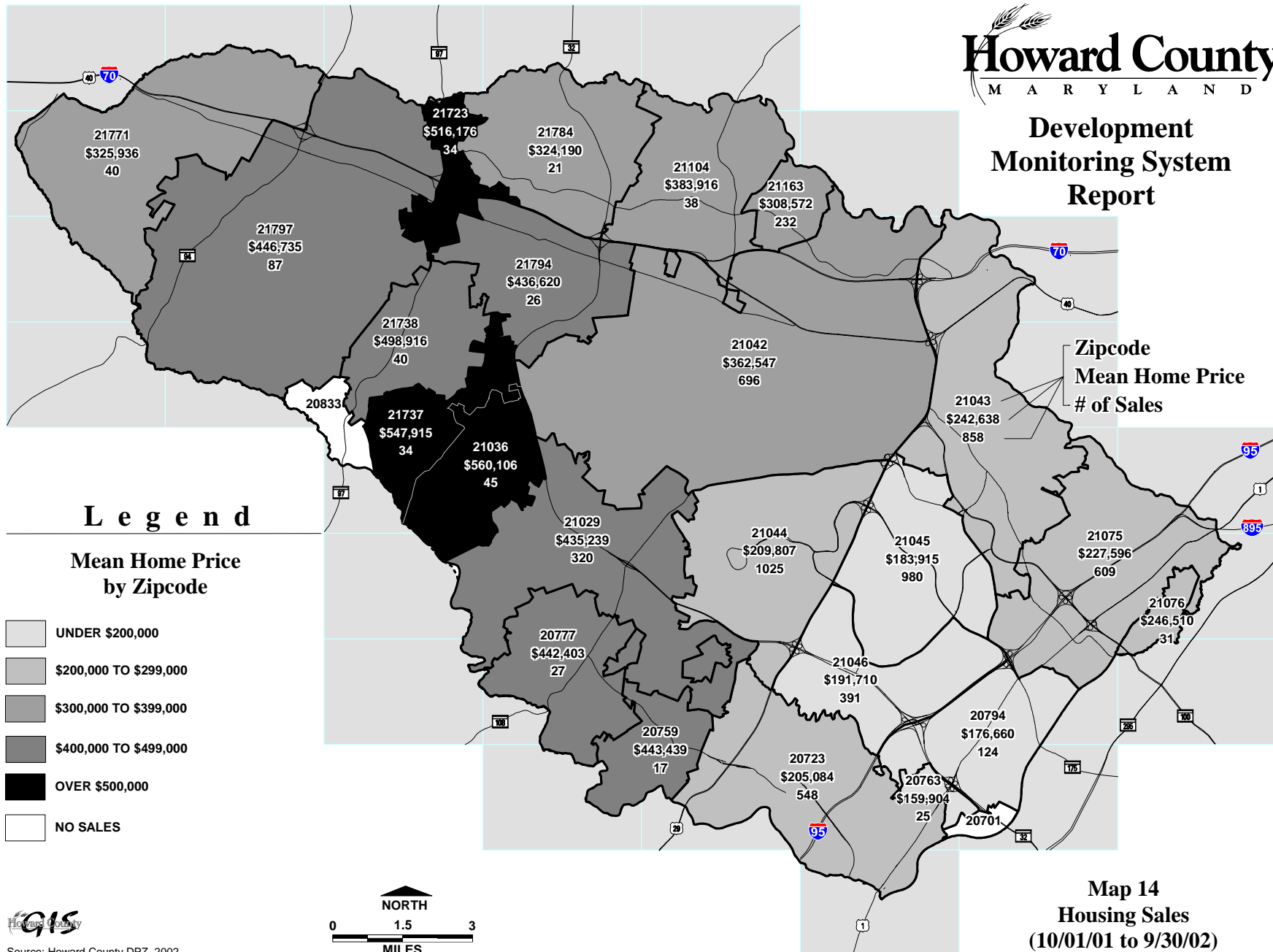


Chart 20
Number of Sales by Unit Type





Development Monitoring System Report



Land Preservation

Agricultural Land Preservation Program

Howard County's Agricultural Land Preservation Program has been the primary tool for preserving farmland. Most of the preserved farmland in this program is from the County's Purchase of Development Rights Program (PDR) where a farmer can voluntarily choose to sell a perpetual easement to the County while holding a fee simple title to the land and continuing to farm. The easement restricts development on the land and remains with the land even when it is sold.

Agricultural land preservation in the County began in 1979 using the State's PDR program. The County instituted its own PDR program, indicated above, in 1984 and until 1988 both the State and County programs were active in preserving farmland. In 1989 the County initiated the innovative Installment Purchase Agreement (IPA) program and local interest in the State program ended. Landowner interest in the State program was renewed in Fiscal Year 2001 based on changes to the Maryland Agricultural Land Preservation Foundation (MALPF) valuation formula and purchase options. The State Board of Public Works approved purchase of an easement on 14 acres at a price of \$8,322 per acre, with settlement expected by the end of 2002. Two additional properties were placed in State preservation districts (the first step toward purchase of easements) in 2002, with easement purchases targeted for FY 2003.

The County's PDR program reached its \$55 million authorization limit in Fiscal Year 1997 and the program was temporarily suspended until Spring 2000 when the County Council authorized an additional \$15 million in IPA commitments. This funding will secure permanent easements on about 2,500 additional acres. In June 2001, the County purchased easements on 400.5 acres at a price of \$2.48 million. In FY 2002 the County Council approved the acquisition of easements on five farms totaling about 350 acres for \$2.02 million, but none of the properties have yet been acquired.

Farmland may also be preserved in the Agricultural Land Preservation Program through the dedication of preservation parcels as part of the

development process, either as the dedication of sending parcels using the Density/Cluster Exchange Options (DEO/CEO) or the dedication of preservation parcels within cluster subdivisions. The DEO/CEO and cluster subdivision zoning regulations were established in 1992.

During the latest one year reporting period, an additional 54 acres of agricultural preservation parcels were created in subdivisions through the development process and were enrolled in the Agricultural Land Preservation Program.

As of September 30, 2002, there were 18,800 acres of permanently preserved agricultural land. This includes 13,224 acres of purchased easements through the County's PDR Program, 3,890 acres of purchased easements by the State and 1,686 preservation acres dedicated as part of the development process (Table 38).

Table 38
Agricultural Preservation Easements, September 30, 2002

Type	Acres	Percent
County Purchased Agric. Easements	13,224	70%
State Purchased Agric. Easements	3,890	21%
Dedicated Agric. Preservation Parcels	1,686	9%
TOTAL	18,800	100%

Dedicated Easement Properties

As previously indicated, last year 54 acres of agricultural preservation parcels were created through the development process and were enrolled in the Agricultural Land Preservation Program. This brings the total acres of land dedicated to date in this manner to 1,686 acres.

Besides agricultural easements, there are additional ways parcels are preserved through the development process. Last year, 138 acres of land were dedicated as joint Howard County/Homeowner's Association preservation parcels, the only other preservation category that received additional acreage. Table 39 shows the land preservation totals from dedicated easements

to date including land preserved in the Agricultural Land Preservation Program, as well as joint Howard County/Homeowner's Association parcels and other easement types.

Since 1992, preservation easements on 5,795 acres have been created by cluster development and the Density/Cluster Exchange Options. Including open space, the total comes to 6,151 acres.

The majority of the total dedicated preservation easements, 3,539 acres, are jointly held by Howard County and various homeowner's associations. As indicated earlier, 1,686 acres are held by the Howard County Agricultural Land Preservation Program. About 440 acres are jointly held by the Howard County Conservancy and Howard County. The remaining 130 acres are jointly held by Howard County and the Audubon Society and by homeowner's associations and the Audubon Society.

Table 39 also indicates the extent of the developed land resulting from the DEO/CEO and cluster zoning. Since 1992, a total of 8,980 acres have been subdivided in the rurally zoned land in the West. About 32 percent of this total, or 2,829 acres, is used for the development of residential lots and road right of ways. The remaining 68 percent, or 6,151 acres, is land in dedicated preservation easements and open space as described earlier. Of the 2,829 acres for residential development, about 913 acres are yet undeveloped, 1,694 acres are developed and 222 acres are for roads.

Preserved easements in the Rural West discussed above total 22,909 acres. This includes all 18,800 acres of agricultural preservation easements and 4,109 acres of other preservation parcels dedicated through the subdivision process. This represents about 24 percent of the approximate 94,660 total acres of land in the Rural West.

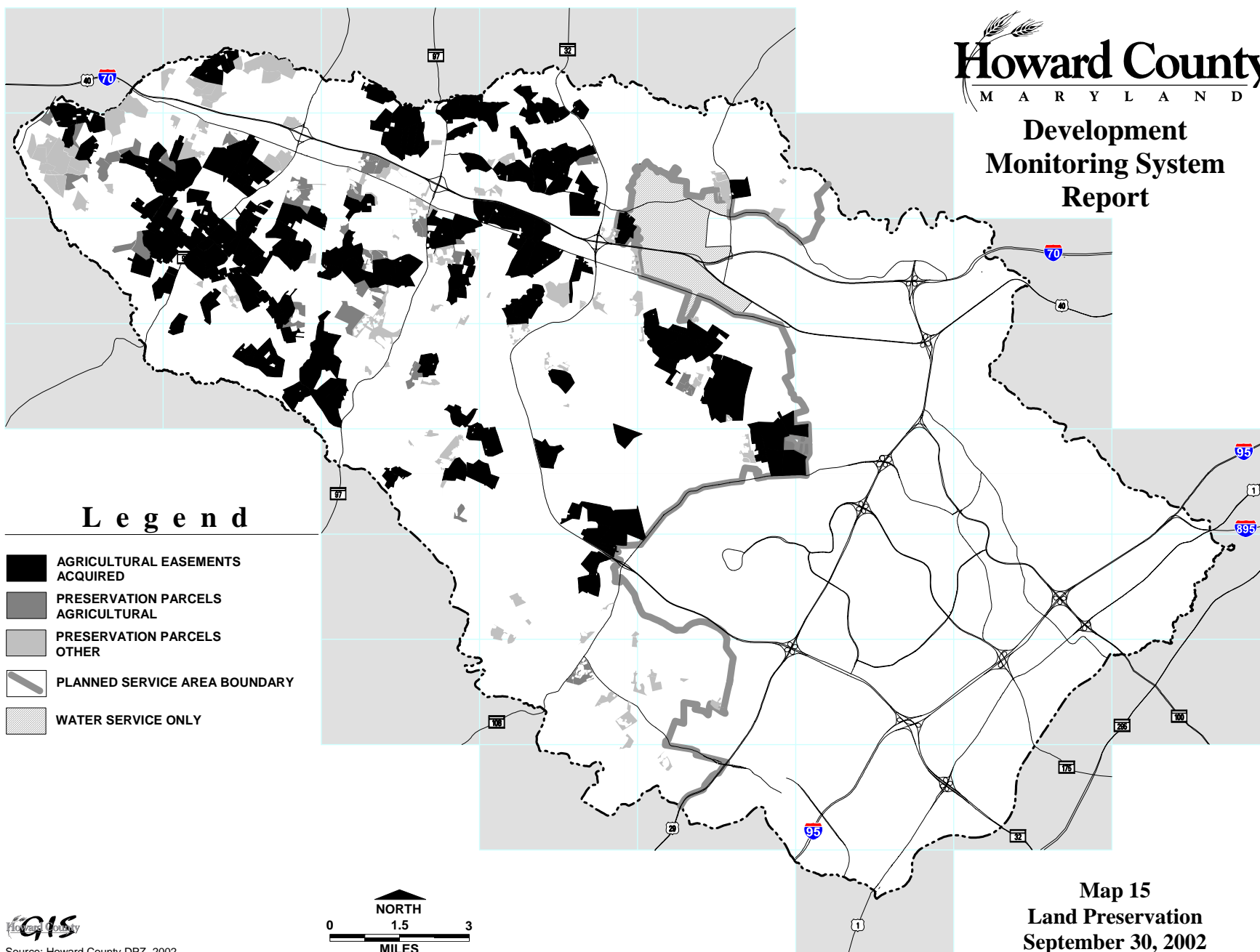
Map 15 shows the preserved land in Howard County as of September 30, 2002 including acquired (purchased) agricultural easements and dedicated agricultural and other preserved parcels.

Table 39
Land Preservation Through Dedicated Easements

Residential Unit Cluster Development	Lots	Acres	
Undeveloped Lots (By Right)	264	337	
Undeveloped Lots (From Density Transfer)	484	576	
Total Undeveloped Lots	748	913	
Developed Lots (By Right)	1,078	1,251	
Developed Lots (From Density Transfer)	422	443	
Total Developed Lots	1,500	1,694	
Roadway		222	
TOTAL	2,248	2,829	31.5%
Open Space and Preservation	Lots	Acres	
Agricultural Preservation	46	1,686	
Howard County/Homeowner's Association	229	3,539	
Howard County/The Audubon Society	3	69	
Homeowner's Assoc./The Audubon Society	2	61	
Howard County Conservancy/Howard County	20	440	
Total Preservation	300	5,795	
Open Space (Dedicated to County)	10	58	
Open Space (Not Dedicated to County)	62	298	
Total Open Space	72	356	
TOTAL	372	6,151	68.5%
GRAND TOTAL (Includes Res. Develop.)	2,620	8,980	100.0%

Total Preserved Land in the Rural West

Including County and State parks and open space and WSSC land (9,300 acres), permanent historic easements (130 acres) and other environmental easements (940 acres) the total preserved land amounts to 33,279 acres, about 35 percent of all land in the Rural West.



Non-Residential Development

Recorded Non-Residential Subdivisions

For this report, non-residential development is tabulated within four regions as shown on Map 16. The number of non-residential *plans* recorded, the number of non-residential *lots* created, and the *acreage* of plans recorded have been compiled for each of these regions and are discussed below. The analysis includes last year's subdivision activity as well as activity for the previous four years.

Summary of Last Year's Results

Last year there were 42 non-residential lots recorded countywide in 39 subdivision plans totaling 1,095 acres (Table 40). These only include newly created lots, and do not include recorded plans for purposes of adjusting lot lines, adding easements or other adjustments. Columbia had the most lots with 21, or 50 percent of the total. The I-95 Corridor had 31 percent of the total with 13 recorded lots. The West had 8 recorded lots last year, and Ellicott City had no newly created lots. Of the 39 subdivision plans recorded last year, 36 percent were in the I-95 Corridor, followed by 31 percent each in Columbia and the West.

Of the total 1,095 acres of non-residential land recorded, 610 acres, or 56 percent, were in the West. A total of 261 acres were recorded in the I-95 Corridor (28 percent). In Columbia there were 179 recorded acres last year representing 16 percent of the total. About 2 acres were recorded in Ellicott City. These include all acres including recordations for the purpose of adjusting lines, adding easements, etc.

Table 41 shows the number of recorded lots by development type. Of the 42 lots newly recorded last year, 18 were for commercial uses (which includes retail and office space), 9 for industrial uses, and 3 were for government/institutional uses. There were also 12 other lots recorded for open space, parks, and roadways. Most of the new commercial lots were in Columbia. The industrial lots were split between the I-95 Corridor, Columbia and the West. There were 2 government/institutional lots recorded in Columbia and one in the I-95 Corridor.

Table 40
Recorded Non-Residential Subdivisions, 10/01/01 to 9/30/02¹

Region	Lots		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	21	50%	12	31%	179	16%
Ellicott City	0	0%	1	3%	2	0%
I-95 Corridor	13	31%	14	36%	304	28%
West	8	19%	12	31%	610	56%
TOTAL	42	100%	39	100%	1,095	100%

1. Includes newly created lots, does not include re-recorded lots for purposes of adjusting lot lines or easements

Table 41
Recorded Lots by Development Type, 10/01/01 to 9/30/02¹

Region	Com.	Ind.	Gov./Inst.	Other ²	TOTAL
Columbia	11	3	2	5	21
Ellicott City	0	0	0	0	0
I-95 Corridor	4	2	1	6	13
West	3	4	0	1	8
TOTAL	18	9	3	12	42
PERCENT	43%	21%	7%	29%	100%

1. Includes newly created lots, does not include re-recorded lots for purposes of adjusting lot lines or easements, etc.

2. Includes roadway, park and open space.

Last Year's Projects - Greater than 50 Acres

Of the total 1,095 non-residential acres recorded last year, 657 acres, about 60 percent of the total, were in 3 subdivisions more than 50 acres in size. These larger subdivisions are shown in Table 42. The location of these plans are shown on Map 16.

One of these larger subdivisions consisted of 102 acres recorded in Columbia as part of the Snowden River Business Park. The other subdivisions were for Johns Hopkins APL (361 acres) and the Western Regional Park (194 acres) in the West.

Five Year Results

Table 43 shows the recorded non-residential subdivisions for the last five years from October 1, 1997 to September 30, 2002. Over this five year period there were 447 non-residential lots recorded countywide in 225 subdivision plans totaling 5,135 acres. This equates to a five year average of 1,027 recorded acres per year. Over the five year period, 47 percent of the acreage was in Columbia, 27 percent in the I-95 Corridor, 21 percent in the West and 5 percent in the Ellicott City.

Table 44 shows the total non-residential acreage recorded by year for each of the last five years. There was more recorded acreage last year compared to the previous year – 1,095 acres last year compared to 835 acres in 2000/2001. Chart 21 shows these results graphically by region. It is apparent that Columbia has had the most activity over the five year period with close to half of the total countywide acreage recorded there. However, the trend over the last four years shows a slowdown of recorded acreage in Columbia and an increase in the I-95 Corridor (with the excep-

Table 42
Recorded Non-Residential Subdivision Plans, Plans With More Than 50 Acres, 10/01/01 to 9/30/02

Region	File Number	Plan Name	Type	Acres	TOTAL
Columbia	F-01-142	Snowden River Business Park	Commercial	102	102
West	F-02-040	Johns Hopkins APL	Commercial	361	555
	F-01-174	Western Regional Park	Gov./Inst.	194	
TOTAL					657

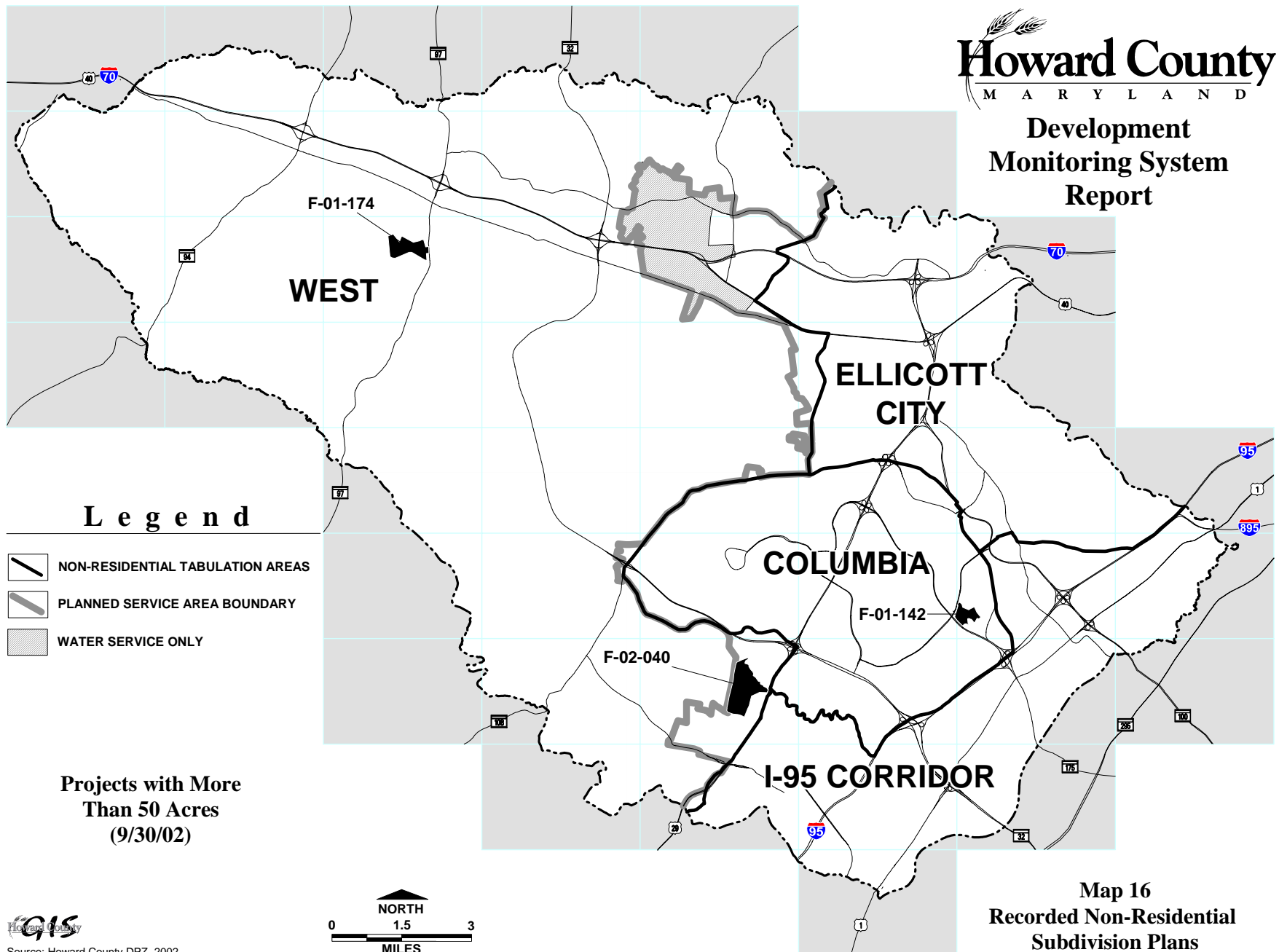


Table 43
Recorded Non-Residential Subdivisions, 10/01/97 to 9/30/02

Region	Lots		Subdivision Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	212	47%	97	43%	2,432	47%
Ellicott City	50	11%	28	12%	263	5%
I-95 Corridor	110	25%	59	26%	1,369	27%
West	75	17%	41	18%	1,071	21%
TOTAL	447	100%	225	100%	5,135	100%
5 YEAR AVG.	89		45		1,027	

1. For 2001/2002, includes newly created lots, does not include re-recorded lots for purposes of adjusting lines, creating easements, etc.

tion of last year). It should again be noted that the recorded acreage includes resubdivisions and does not reflect net new recorded non-residential acreage.

Table 45 summarizes the number of lots by development type for each of the last five years. The five year total by development type is also shown in the bottom right hand corner of the table. For the five year period, industrial lots comprised 38 percent of the total 447 recorded lots. This is followed by commercial lots at 32 percent of the total and other lots at 24 percent of the total. (Other lots include easements, recreation parcels, open space, a golf course, cemeteries, non-buildable parcels, stormwater management areas and roadways.) Institutional and government lots consisted of the remaining 6 percent of the five year total.

Chart 21
Recorded Non-Residential Acres

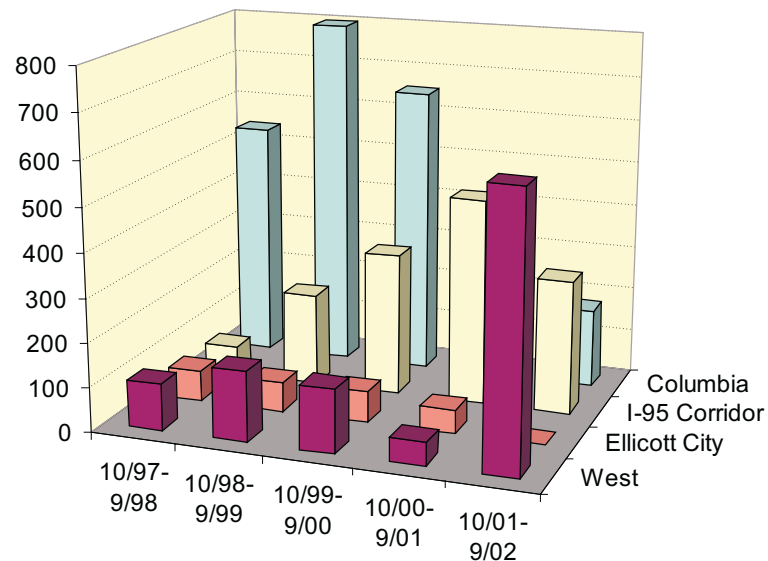


Table 44
Recorded Non-Residential Acreage, 10/01/97 to 9/30/02

Region	10/97-9/98	10/98-9/99	10/99-9/00	10/00-9/01	10/01-9/02	TOTAL	PERCENT
Columbia	540	799	653	261	179	2,432	47%
Ellicott City	70	67	71	53	2	263	5%
I-95 Corridor	65	209	323	468	304	1,369	27%
West	106	159	143	53	610	1,071	21%
TOTAL	781	1,234	1,190	835	1,095	5,135	100%

Table 45
Number of Non-Residential Recorded Lots by Development Type, 10/01/97 to 9/30/02¹

10/97 to 9/98					
Region	Com.	Ind.	Gov./Inst.	Other ²	TOTAL
Columbia	22	15	4	4	45
Ellicott City	7	0	4	2	13
I-95 Corridor	7	4	0	1	12
West	0	5	0	3	8
TOTAL	36	24	8	10	78
PERCENT	46%	31%	10%	13%	100%

10/99 to 9/00					
Region	Com.	Ind.	Gov./Inst.	Other ²	TOTAL
Columbia	17	21	1	20	59
Ellicott City	15	0	1	0	16
I-95 Corridor	2	22	1	4	29
West	5	7	1	8	21
TOTAL	39	50	4	32	125
PERCENT	31%	40%	3%	26%	100%

10/01 to 9/02					
Region	Com.	Ind.	Gov./Inst.	Other ²	TOTAL
Columbia	11	3	2	5	21
Ellicott City	0	0	0	0	0
I-95 Corridor	4	2	1	6	13
West	3	4	0	1	8
TOTAL	18	9	3	12	42
PERCENT	43%	21%	7%	29%	100%

10/98 to 9/99					
Com.	Ind.	Gov./Inst.	Other ²	TOTAL	
9	17	2	23	51	
10	2	0	5	17	
2	11	0	3	16	
13	8	0	8	29	
34	38	2	39	113	
30%	34%	2%	35%	100%	

10/00 to 9/01					
Com.	Ind.	Gov./Inst.	Other ²	TOTAL	
12	13	3	8	36	
0	0	3	1	4	
1	32	1	6	40	
3	5	1	0	9	
16	50	8	15	89	
18%	56%	9%	17%	100%	

TOTAL 10/97 to 9/02					
Com.	Ind.	Gov./Inst.	Other ²	TOTAL	
71	69	12	60	212	
32	2	8	8	50	
16	71	3	20	110	
24	29	2	20	75	
143	171	25	108	447	
32%	38%	6%	24%	100%	

1. For 2001/2002, includes newly created lots, does not include re-recorded lots for purposes of adjusting lines, creating easements, etc.

2. Includes roadway, park and open space.

In-Process Non-Residential Subdivisions

This section summarizes non-residential subdivisions in process. Subdivision plans in four stages (sketch, preliminary equivalent sketch, preliminary, and final) are reported. The number of plans, potential lots and acreage currently being processed as of September 30, 2001 are tabulated and compared with those in process a year earlier (as of September 30, 2000).

Number of Plans

Countywide, there were 31 non-residential plans in process as of September 30, 2002, close to the same number last year when there were 30 plans in process (Table 46). Similar to the previous year, most plans were in the

I-95 Corridor (16 plans). There were also 10 plans each in the West, 3 plans in Columbia and 2 plans in Ellicott City last year.

For both years most of the plans were in the Final Plan stage. This is primarily due to the relatively high number of resubdivisions which only come in at the Final Plan stage.

Number of Lots

Table 47 shows the number of potential non-residential lots in process. As of September 30, 2002, there were 79 lots in process, 8 more than the 71 in process on September 30, 2001. Note that for the current year, 2002, the

Table 46
Number of Non-Residential Plans in Process, 09/30/01 and 09/30/02

Region	Sketch		Preliminary Equivalent Sketch		Preliminary		Final		TOTAL PLANS	
	2001	2002	2001	2002	2001	2002	2001	2002	2001	2002
Columbia	0	0	1	0	0	0	7	3	8	3
Ellicott City	0	0	0	0	0	0	0	2	0	2
I-95 Corridor	1	2	1	1	1	0	11	13	14	16
West	3	1	0	0	1	0	4	9	8	10
TOTAL	4	3	2	1	2	0	22	27	30	31

Table 47
Number of Potential Non-Residential Lots from Subdivision Plans in Process, 09/30/01 and 09/30/02¹

Region	Sketch		Preliminary Equivalent Sketch		Preliminary		Final		TOTAL LOTS	
	2001	2002	2001	2002	2001	2002	2001	2002	2001	2002
Columbia	0	0	2	0	0	0	15	8	17	8
Ellicott City	0	0	0	0	0	0	0	2	0	2
I-95 Corridor	1	6	16	2	5	0	23	46	45	54
West	3	1	0	0	1	0	5	14	9	15
TOTAL	4	7	18	2	6	0	43	70	71	79

1. For 2002, includes newly created lots, does not include re-recorded lots for purposes of adjusting lines, creating easements, etc.

lots shown only include newly created lots and do not include recordations for purposes of adjusting lot lines, creating easements or other adjustments.

Most of the non-residential lots in process for both years were in the I-95 Corridor. For 2002, the West had the second highest number of lots (15), followed by Columbia with 8. There were two lots in process in Ellicott City on September 30, 2002. Table 50 shows a more detailed breakdown of the number of non-residential lots in process by development type for this most recent year and for one year earlier.

Number of Acres

There were a total of 820 non-residential acres in the subdivision process as of September 30, 2002 (Table 48). This compares to 1,265 acres in process

one year earlier. For the current year most of the acreage is in the I-95 Corridor (461 acres). This is followed by the West with 308 acres, Ellicott City with 32 acres and Columbia with 19 acres.

Major Projects

Of the 820 acres of non-residential land in process, 619 acres (about 75 percent) are for projects greater than 50 acres (Table 49). The largest of these are 116 acres in the West as part of the Covenant Baptist Church (although the purpose of this plat is only to show easements). Other larger properties in the West include Maple Lawn Farms and Turf Valley. In the I-95 Corridor, larger plans include Emerson, Exeter Industrial Park, the Revitz Property and the Blue Stream Corporate Center. Map 17 shows the locations of these projects.

Table 48
Acreage of Non-Residential Subdivision Plans in Process, 09/30/01 and 09/30/02

Region	Sketch		Preliminary Equivalent Sketch		Preliminary		Final		TOTAL PLANS	
	2001	2002	2001	2002	2001	2002	2001	2002	2001	2002
Columbia	0	0	16	0	0	0	143	19	159	19
Ellicott City	0	0	0	0	0	0	0	32	0	32
I-95 Corridor	84	147	99	7	71	0	134	307	388	461
West	504	25	0	0	17	0	197	283	718	308
TOTAL	588	172	115	7	88	0	474	641	1,265	820

Table 49
In-Process Non-Residential Subdivision Plans, Plans With More Than 50 Acres, 09/30/02

Region	File Number	Plan Name	Type	Acres	TOTAL
I-95 Corridor	F-02-111	Revitz Property	Commercial	95	388
	F-02-131	Emerson	Commercial	70	
	F-02-035	Blue Stream Corporate Center	Industrial	76	
	S-99-012	Emerson	Commercial	73	
	S-02-017	Exeter Industrial Park	Industrial	74	
West	F-02-074	Turf Valley Professional Buildings	Commercial	63	231
	F-03-007	Maple Lawn Farms	Commercial	52	
	F-02-103	Covenant Baptist Church	Inst. - Purpose to show easements	116	
TOTAL					619

Table 50
Number of Potential Lots From Non-Residential Subdivision Plans in Process by Development Type, 09/30/01 and 09/30/02¹

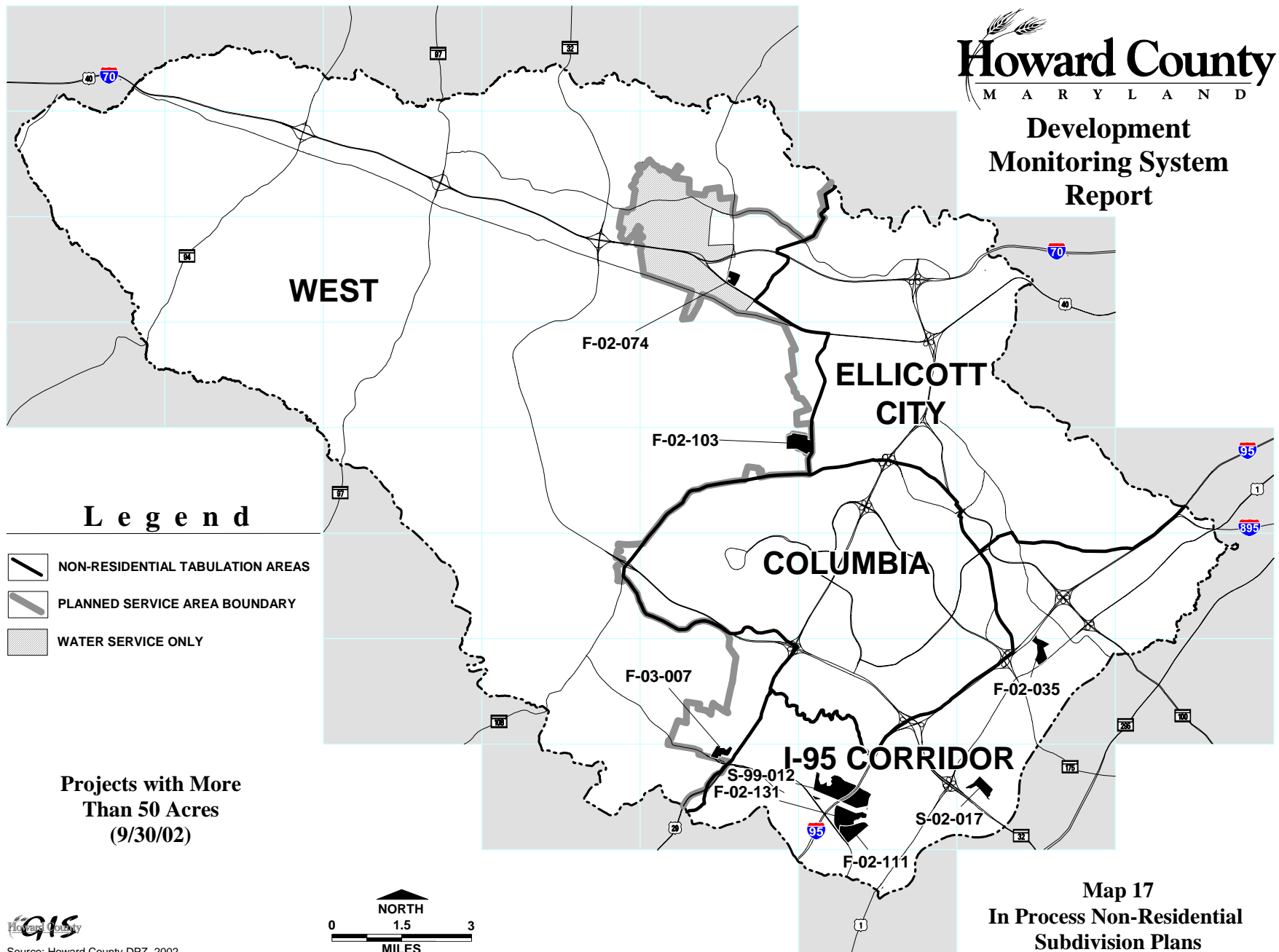
09/30/02 ==> Sketch						Preliminary Equivalent Sketch				
Region	Com.	Ind.	Gov./Inst.	Other ²	TOTAL	Com.	Ind.	Gov./Inst.	Other ²	TOTAL
Columbia	0	0	0	0	0	0	0	0	0	0
Ellicott City	0	0	0	0	0	0	0	0	0	0
I-95 Corridor	1	5	0	0	6	0	2	0	0	2
West	1	0	0	0	1	0	0	0	0	0
TOTAL	2	5	0	0	7	0	2	0	0	2

09/30/02 ==> Preliminary						Final					TOTAL - 09/30/02				
Region	Com.	Ind.	Gov./Inst.	Other ²	TOTAL	Com.	Ind.	Gov./Inst.	Other ²	TOTAL	Com.	Ind.	Gov./Inst.	Other ²	TOTAL
Columbia	0	0	0	0	0	8	0	0	0	8	8	0	0	0	8
Ellicott City	0	0	0	0	0	0	0	2	0	2	0	0	2	0	2
I-95 Corridor	0	0	0	0	0	16	11	0	19	46	17	18	0	19	54
West	0	0	0	0	0	9	0	0	5	14	10	0	0	5	15
TOTAL	0	0	0	0	0	33	11	2	24	70	35	18	2	24	79

09/30/01 ==> Sketch						Preliminary Equivalent Sketch				
Region	Com.	Ind.	Gov./Inst.	Other ²	TOTAL	Com.	Ind.	Gov./Inst.	Other ²	TOTAL
Columbia	0	0	0	0	0	1	0	0	1	2
Ellicott City	0	0	0	0	0	0	0	0	0	0
I-95 Corridor	1	0	0	0	1	8	0	0	8	16
West	3	0	0	0	3	0	0	0	0	0
TOTAL	4	0	0	0	4	9	0	0	9	18

09/30/01 ==> Preliminary						Final					TOTAL - 09/30/01				
Region	Com.	Ind.	Gov./Inst.	Other ²	TOTAL	Com.	Ind.	Gov./Inst.	Other ²	TOTAL	Com.	Ind.	Gov./Inst.	Other ²	TOTAL
Columbia	0	0	0	0	0	4	3	0	8	15	5	3	0	9	17
Ellicott City	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
I-95 Corridor	3	0	0	2	5	5	8	0	10	23	17	8	0	20	45
West	1	0	0	0	1	2	0	0	3	5	6	0	0	3	9
TOTAL	4	0	0	2	6	11	11	0	21	43	28	11	0	32	71

1. For 2002, includes newly created lots, does not include re-recorded lots for purposes of adjusting lines, creating easements, etc.
2. Includes access easements, open space, stormwater management, and roadway.



Approved Non-Residential Site Development Plans

The site development plan (SDP) process is usually the next development stage after lots are recorded. Once an SDP is approved, building permits can be issued after which actual land development can begin. Similar to subdivision activity, non-residential site development activity is tabulated by four regions. The number of non-residential site development *plans* approved, the number of *lots* approved, and the *acreage* of approved plans have been compiled for each of these regions and are discussed below.

Additionally, the square footage of floor space in approved site development plans is compiled. This is useful to estimate employment, which is discussed later in this report (Page 78). The analysis includes last year's site development plan activity as well as activity for the previous four years.

Summary of Last Year's Results

Last year there were 61 non-residential lots approved countywide in 58 site development plans totaling about 1,294 acres (Table 51). Columbia had the most activity with 22 lots approved, 36 percent of the total. The I-95 Corridor had 30 percent of the total with 18 approved lots. The West had 13 approved lots last year, followed by the Ellicott City with 8 approved lots. Of the 58 site development plans approved last year, 20 were in Columbia, followed by 17 in the I-95 Corridor, 13 in the West and 8 in the Ellicott City.

Region	Lots		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	22	36%	20	34%	325	25%
Ellicott City	8	13%	8	14%	58	4%
I-95 Corridor	18	30%	17	29%	294	23%
West	13	21%	13	22%	617	48%
TOTAL	61	100%	58	100%	1,294	100%

Of the total 1,294 acres of non-residential land approved in site development plans, 617 acres, or 48 percent, were in the West. A total of 325 acres were approved in Columbia (25 percent). In the I-95 Corridor there were 294 approved acres last year representing 23 percent of the total. The least amount of non-residential acreage was recorded in Ellicott City with 58 acres representing only 4 percent of the total.

Table 52 shows the number of approved lots by development type. Of the 61 lots approved last year, 16 are for government & institutional uses, 13 each are for retail and office/service uses and 10 are for manufacturing & extensive industrial uses. There were also 9 other lots approved for open space, paved surfaces, park and athletic facilities and other uses. Most of the new lots are in Columbia, followed by the I-95 Corridor, the West and Ellicott City.

Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL
Columbia	6	8	1	4	3	22
Ellicott City	3	0	0	4	1	8
I-95 Corridor	1	2	9	2	4	18
West	3	3	0	6	1	13
TOTAL	13	13	10	16	9	61

1. Includes open space, paved surfaces, park facilities, athletic facilities, etc.

Table 53 shows the square footage of building space in last year's approved site development plans by type of use. Countywide, there was almost 1.7 million square feet of building space approved. About 33 percent of this total, about 560,000 square feet, was in the West. Almost 500,000 square feet was in the I-95 Corridor (30 percent). Columbia followed closely with about 480,000 square feet approved (29 percent), followed by Ellicott City with about 140,000 square feet (8 percent).

Slightly more than 37 percent of the total building space is for office/service uses totaling 628,000 square feet. This is followed by government & institutional space with 425,000 square feet of approved building space (25 percent). About 362,000 square feet are for manufacturing & extensive industrial uses (22 percent), and about 250,000 square feet are for retail use (16 percent).

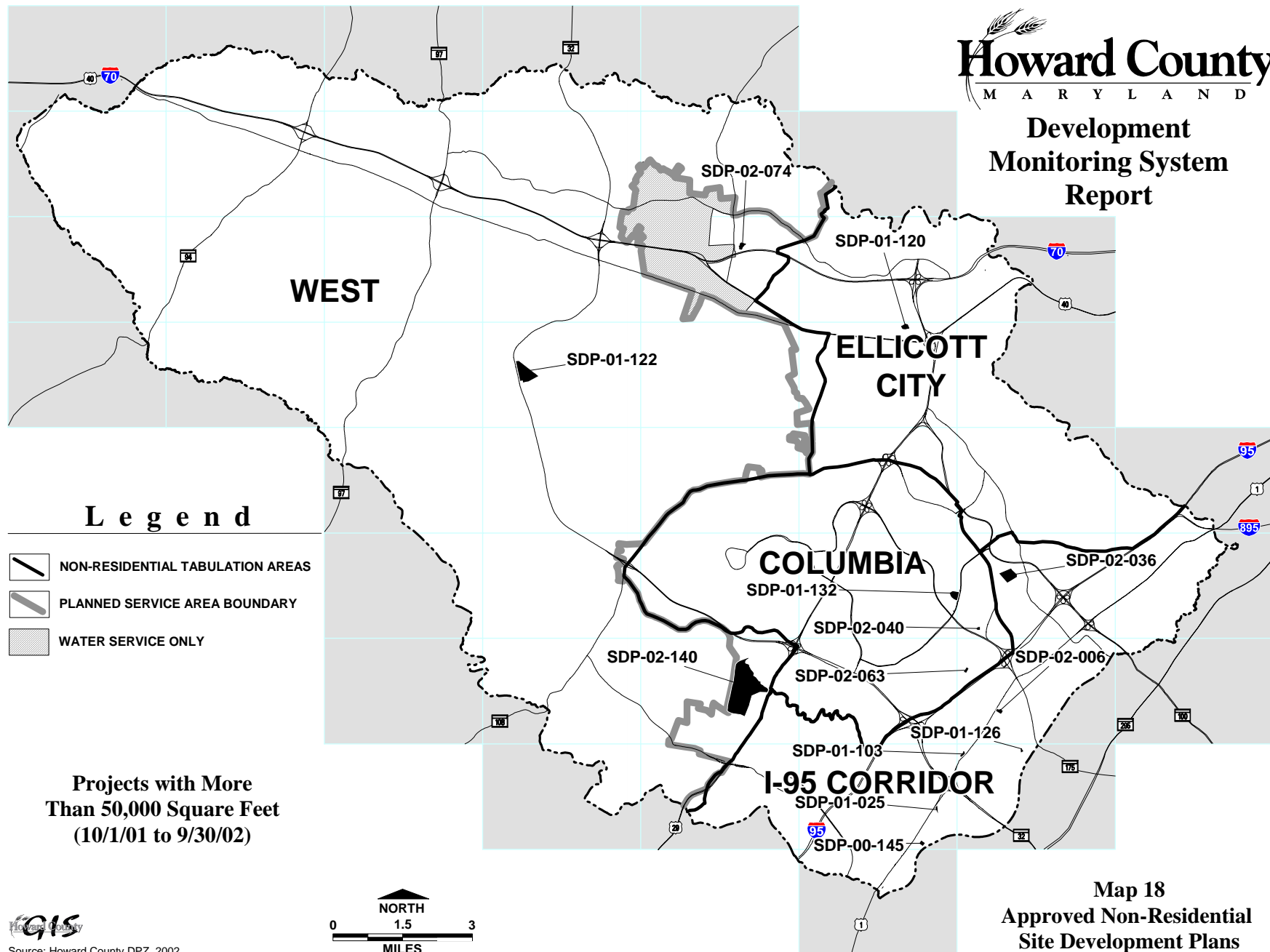
Table 53 Building Square Feet in Approved Site Development Plans, 10/01/01 to 9/30/02						
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other	TOTAL
Columbia	116,334	290,815	6,600	63,368	0	477,117
Ellicott City	29,524	6,687	0	102,746	0	138,957
I-95 Corridor	55,000	13,549	354,577	75,497	0	498,623
West	58,410	317,028	0	183,297	0	558,735
TOTAL	259,268	628,079	361,177	424,908	0	1,673,432
PERCENT	15.5%	37.5%	21.6%	25.4%	0.0%	100.0%

Last Year's Projects - Greater than 50,000 Square Feet

Of the almost 1.7 million square feet of non-residential building space approved in site development plans last year, a little over 1.1 million square feet, about 68 percent of the total, were in plans with more than 50,000 square feet. These larger plans are shown in Table 54. The location of these plans are shown on Map 18.

In Columbia, three plans with more 50,000 square feet of building space were approved last year. These plans, located in various parts of Columbia as described in Table 54, total almost 276,000 square feet. In Ellicott City, one plan had more than 50,000 square feet and along the I-95 Corridor, six larger plans were approved totaling slightly more than 400,000 square feet. In the West three large plans totaling almost 400,000 square feet were approved, including the largest plan approved Countywide last year, a 240,000 square foot office/laboratory complex at Johns Hopkins University APL.

Table 54 Projects With More Than 50,000 Square Feet in Approved Non-Residential Site Development Plans, 10/01/01 to 9/30/02					
Region	File Number	Plan Name	Use	Building Area	TOTAL
Columbia	SDP-02-063	Columbia Gateway	Office	53,912	275,679
	SDP-01-132	Route 175 Commercial	Home Improvement/Retail	100,908	
	SDP-02-040	Homewood Suites at Benson Park	Hotel	120,859	
Ellicott City	SDP-01-120	Church of the Resurrection	Church School	50,382	50,382
I-95 Corridor	SDP-01-126	Dorsey Run Park	Warehouse	50,040	406,263
	SDP-01-103	Columbia Junction	Retail Site	55,000	
	SDP-00-145	Maier Industrial Park	Warehouse	64,000	
	SDP-02-006	Route 1 Business Park	Warehouse	71,836	
	SDP-02-036	Northeastern Elementary School	Public School	75,497	
	SDP-01-025	Storage USA Facility	Self Storage Building	89,890	
West	SDP-02-074	GTW's Waverly Woods	Office & Day Care	66,000	398,000
	SDP-01-122	Western Middle School # 3	Public School	92,000	
	SDP-02-140	Johns Hopkins University APL	Office - Laboratory	240,000	
TOTAL					1,130,324



Five Year Results

Table 55 shows the approved non-residential site development plans for the last five years from October 1, 1997 to September 30, 2002. Over this five year period there were 409 non-residential lots approved countywide in 341 plans totaling 4,329 acres. This equates to a five year average of 866 approved acres per year. Over the five year period, 33 percent of the acreage was in Columbia, 31 percent in the I-95 Corridor, 29 percent in the West and 9 percent in Ellicott City.

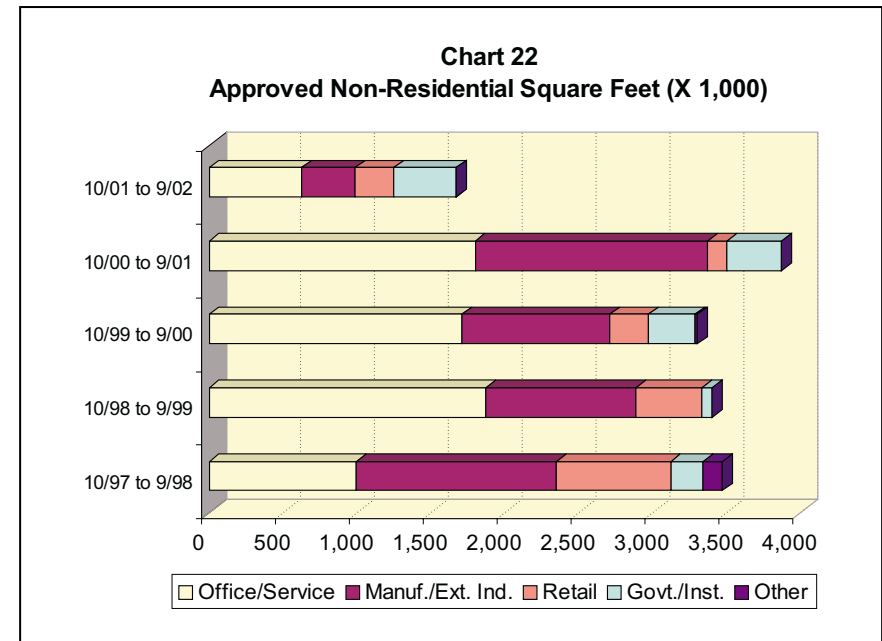
Table 55 Approved Non-Residential Site Development Plans, 10/01/97 to 9/30/02						
Region	Lots		Site Dev. Plans		Acreage	
	Number	Percent	Number	Percent	Number	Percent
Columbia	177	43%	124	36%	1,436	33%
Ellicott City	58	14%	54	16%	314	7%
I-95 Corridor	116	28%	106	31%	1,326	31%
West	58	14%	57	17%	1,253	29%
TOTAL	409	100%	341	100%	4,329	100%
5 YEAR AVG.	82		68		866	

Table 56 shows the total non-residential acreage approved by year for each of the last five years. Last year, 341 more acres were approved compared to the previous year – 1,294 acres last year compared to 953 acres for the year before.

Table 56 Acreage in Approved Non-Residential Site Development Plans, 10/01/97 to 9/30/02							
Region	10/97-9/98	10/98-9/99	10/99-9/00	10/00-9/01	10/01-9/02	TOTAL	PERCENT
Columbia	331	160	300	320	325	1,436	33%
Ellicott City	16	68	99	73	58	314	7%
I-95 Corridor	82	259	239	453	294	1,326	31%
West	123	286	121	107	617	1,253	29%
TOTAL	551	772	758	953	1,294	4,329	100%

Table 57 summarizes the approved square footage by development type for each of the last five years. The five year total by development type is also shown in the bottom right hand corner of the table. For the five year period, about 15.7 million square feet of non-residential space has been approved in the County. This is an average of about 3.1 million square feet per year.

Of this total, close to 45 percent or 7 million square feet are for office/service space. Almost 34 percent or 5.3 millions square feet are for



manufacturing & extensive industrial development (which includes warehouse space). Retail space accounts for about 12 percent of the total with about 1.9 million square feet approved. Government & institutional uses account for about 9 percent of the approved building space (about 1.4 million square feet). The remaining 1 percent (146,000 square feet) are for other uses.

Chart 22 graphically shows the countywide square footage approved by development type for each of the last five years. It is clear that there was a large reduction in approved space last year compared to the prior four years. Last year, the amount of approved space was only about 40 to 50 percent of what it was for each of the previous four years. This reduction primarily occurred in the amount of office/service and manufacturing & extensive industrial space approved. There was actually more government & institutional space approved last year compared to each the previous four

years, primarily due to several new schools as well as a number of school expansions. The amount of retail space approved last year was also greater than the amount approved the previous year, although less than the three years prior to that.

Chart 23 shows the five year approved square footage total by development type by region. It is clear that the I-95 Corridor has had the most manufacturing & extensive industrial square footage approved followed by Columbia. Columbia has had the most office/service and retail square footage approved over the five year period.

Chart 24 shows the total non-residential square footage approved over time for each region. Overall, Columbia and the I-95 Corridor have had the most square footage approved, followed by Ellicott City and then the West. Table 57 reflects these results numerically.

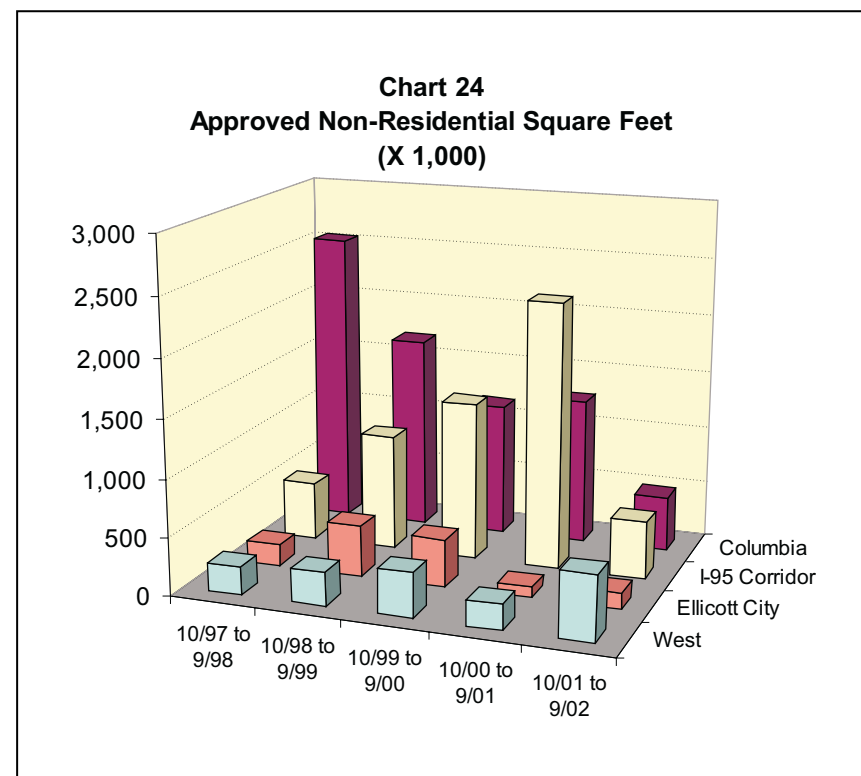
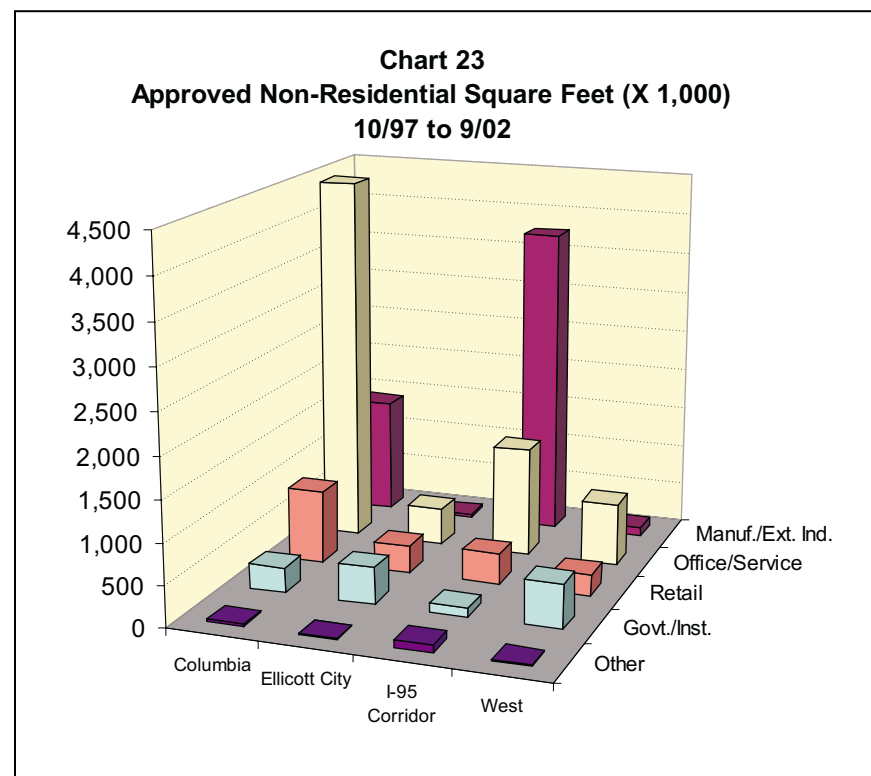


Table 57
Building Square Feet in Approved Non-Residential Site Development Plans, 10/01/97 to 9/30/02

10/97-9/98						
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL
Columbia	593,619	728,614	1,133,258	54,172	28,348	2,538,011
Ellicott City	24,570	0	0	163,811	0	188,381
I-95 Corridor	147,173	51,247	218,842	0	86,107	503,369
West	9,300	216,328	0	0	15,260	240,888
TOTAL	774,662	996,189	1,352,100	217,983	129,715	3,470,649
PERCENT	22.3%	28.7%	39.0%	6.3%	3.7%	100.0%
10/99-9/00						
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL
Columbia	117,171	931,874	56,145	42,465	0	1,147,655
Ellicott City	26,287	259,259	0	121,705	139	407,390
I-95 Corridor	115,166	412,006	829,402	0	6,951	1,363,525
West	1,722	107,216	113,932	155,502	4,800	383,172
TOTAL	260,346	1,710,355	999,479	319,672	11,890	3,301,742
PERCENT	7.9%	51.8%	30.3%	9.7%	0.4%	100.0%
10/01-9/02						
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL
Columbia	116,334	290,815	6,600	63,368	0	477,117
Ellicott City	29,524	6,687	0	102,746	0	138,957
I-95 Corridor	55,000	13,549	354,577	75,497	0	498,623
West	58,410	317,028	0	183,297	0	558,735
TOTAL	259,268	628,079	361,177	424,908	0	1,673,432
PERCENT	15.5%	37.5%	21.6%	25.4%	0.0%	100.0%

10/98-9/99					
Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL
4,000	1,593,835	58,125	20,157	0	1,676,117
242,826	169,625	24,250	0	4,663	441,364
12,000	54,309	934,540	0	0	1,000,849
187,026	56,411	0	45,488	0	288,925
445,852	1,874,180	1,016,915	65,645	4,663	3,407,255
13.1%	55.0%	29.8%	1.9%	0.1%	100.0%
10/00-9/01					
Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL
63,728	916,932	153,206	127,111	0	1,260,977
14,555	20,401	0	59,030	139	94,125
49,160	796,563	1,421,193	28,352	0	2,295,268
2,237	65,930	0	152,185	0	220,352
129,680	1,799,826	1,574,399	366,678	139	3,870,722
3.4%	46.5%	40.7%	9.5%	0.0%	100.0%
TOTAL 10/97-9/02					
Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL
894,852	4,462,070	1,407,334	307,273	28,348	7,099,877
337,762	455,972	24,250	447,292	4,941	1,270,217
378,499	1,327,674	3,758,554	103,849	93,058	5,661,634
258,695	762,913	113,932	536,472	20,060	1,692,072
1,869,808	7,008,629	5,304,070	1,394,886	146,407	15,723,800
11.9%	44.6%	33.7%	8.9%	0.9%	100.0%

1. Includes communications tower, park facilities, storage building, guard house, pumping station, mausoleum expansion and non-employee generating storage space.

In-Process Non-Residential Site Development Plans

This section summarizes non-residential site development plans that are in process. The number of plans, potential lots, acreage and square footage of floor space currently being processed as of September 30, 2002 are tabulated and compared with those in process a year earlier (as of September 30, 2001).

Number of Plans

Countywide, there were 68 non-residential site development plans in process as of September 30, 2002, 14 more than the 54 in process one year earlier (Table 58). All regions except Columbia had more plans in process this current year compared to last year. As of September 30, 2002, the I-95 Corridor had the most plans in process with 19. This is followed by 18 plans in process in Ellicott City, 16 in the West and 15 in Columbia.

Table 58
Number of Non-Residential SDP's In Process, 09/30/01 & 09/30/02

Region	2001	2002
Columbia	18	15
Ellicott City	12	18
I-95 Corridor	13	19
West	11	16
TOTAL	54	68

Number of Lots

Table 59 shows the number of potential non-residential lots in the site development plan process. Results are shown for each year and by development type. Similar to the number of plans, there were more lots in process on September 30, 2002 compared to one year earlier, 71 versus 65, respectively.

The greatest number of the non-residential lots in process were in Ellicott City with 20, followed by 19 in the I-95 Corridor, 17 in the West and 15 in Columbia.

As of September 30, 2002, there were 17 government and institutional lots in the site development plan process. There were 8 manufacturing/extensive industrial lots in process, 10 retail lots in process, 16 office/service lots in process and 20 other lots in process.

Number of Acres

There were a total of 1,321 acres of non-residential land in the site development plan process as of September 30, 2002 (Table 60). This compares to a slightly smaller amount of 1,183 acres in process the previous year. For the current year, the greatest acreage was in the West (485 acres including almost 190 acres for the Western Regional Park). The I-95 Corridor had the second greatest amount of acreage in process (464 acres including 328

Table 59
Number of Lots in Site Development Plans In Process by Development Type, 09/30/01 & 09/30/02

Region	Retail		Office/Service		Manuf./Ext. Ind.		Govt. & Inst.		Other ¹		TOTAL	
	2001	2002	2001	2002	2001	2002	2001	2002	2001	2002	2001	2002
Columbia	3	3	6	4	1	0	4	2	8	6	22	15
Ellicott City	3	1	2	3	0	0	4	6	5	10	14	20
I-95 Corridor	1	2	1	8	11	7	1	1	4	1	18	19
West	4	4	1	1	1	1	5	8	0	3	11	17
TOTAL	11	10	10	16	13	8	14	17	17	20	65	71

1. Includes mass grading, paved surfaces, athletic fields, stormwater management ponds, community bldgs/pool, storage bldgs and parks.

acres for the Chase quarry). This is followed by Ellicott City with 191 acres (including 76 acres for Meadowbrook Park), and Columbia with 181 acres (including 171 acres for a parking lot at the Howard County Community College).

Table 60
Acreage of Non-Residential SDP's In Process, 09/30/01 & 09/30/02

Region	2001	2002
Columbia	325	181
Ellicott City	199	191
I-95 Corridor	465	464
West	194	485
TOTAL	1,183	1,321

Building Floor Space

Table 61 shows the square footage of non-residential building space by building type in the site development plan process. As of September 30, 2002 there was slightly more than 1.7 million square feet in process. This compares to slightly more than a million square feet in process for the previous year, 700,000 square feet more.

For both years most of the building space was in the I-95 Corridor. This is followed by planned space in Columbia and the West. Ellicott City had the least amount of planned building space.

As of September 30, 2002, there was about 662,000 square feet of manufacturing/extensive industrial building space in the site development plan process. This is followed by about 477,000 square feet of office/service space, 349,000 square feet of government and institutional space and 221,000 square feet of retail space in process. Chart 25 reflects these results graphically and by region.

Major Projects

Of the total 1.7 million square feet of non-residential building space in the site development plans process as of September 30, 2002, about 1.1 million square feet, 64 percent of the total, were in plans with more than 50,000 square feet. These larger plans are shown in Table 61. The location of these plans are shown on Map 19.

In Columbia, three plans greater than 50,000 square feet totaling 230,000 square feet were in process -- the Columbia Palace Shopping Center (a supermarket and additional retail replacing the old theater), a 98,000 square foot office building in the Gateway Office Park, and some more retail as part of the Route 175 Commercial complex next to the recently built Home Depot Expo Design Center. In the I-95 Corridor, there were five larger plans in process, totaling about 667,000 square feet. These plans consist primarily of warehouse space including the large 345,000 square foot Giant Food Distribution Center (Exeter Industrial Park). In the West, larger projects include some office and retail in the Waverly Woods development and a planned new 137,000 square foot northern high school.

Table 61
Building Square Feet in In-Process Non-Residential Site Development Plans, 09/30/01 & 09/30/02

Region	Retail		Office/Service		Manuf./Ext. Ind.		Govt. & Inst.		Other		TOTAL	
	2001	2002	2001	2002	2001	2002	2001	2002	2001	2002	2001	2002
Columbia	100,908	137,097	139,898	151,269	6,600	0	32,273	16,136	0	0	279,679	304,502
Ellicott City	29,711	2,880	37,731	43,315	0	0	106,303	115,747	0	6,868	173,745	168,810
I-95 Corridor	55,000	3,260	71,389	224,356	338,199	659,038	9,940	9,940	0	15,000	474,528	911,594
West	61,161	77,798	11,792	57,832	3,000	3,000	41,855	207,494	0	9,670	117,808	355,794
TOTAL	246,780	221,035	260,810	476,772	347,799	662,038	190,371	349,317	0	31,538	1,045,760	1,740,700

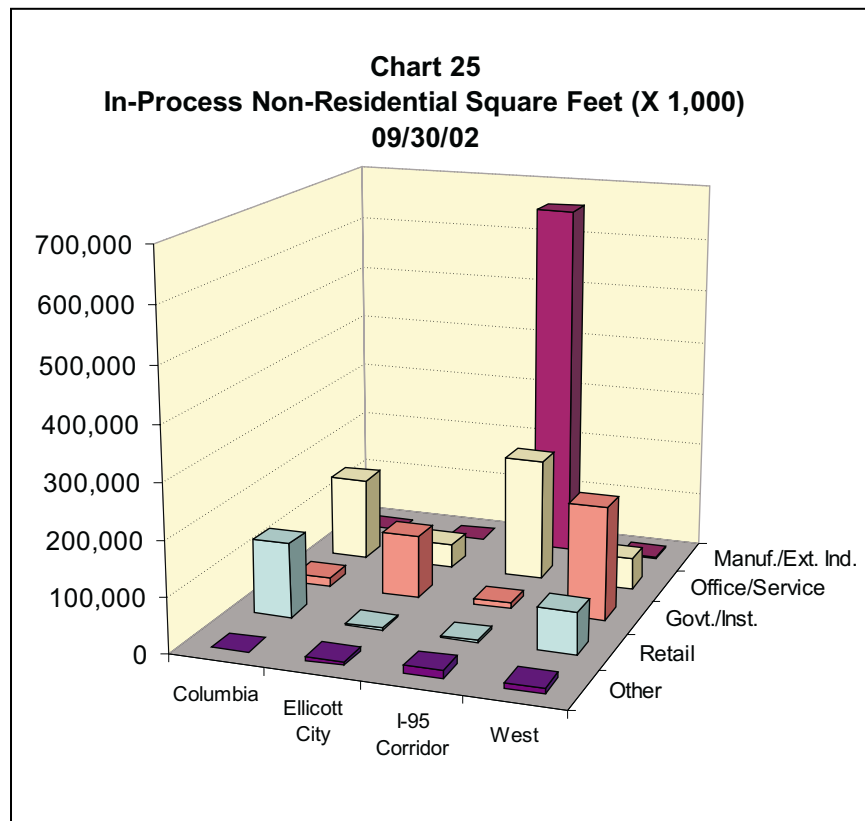
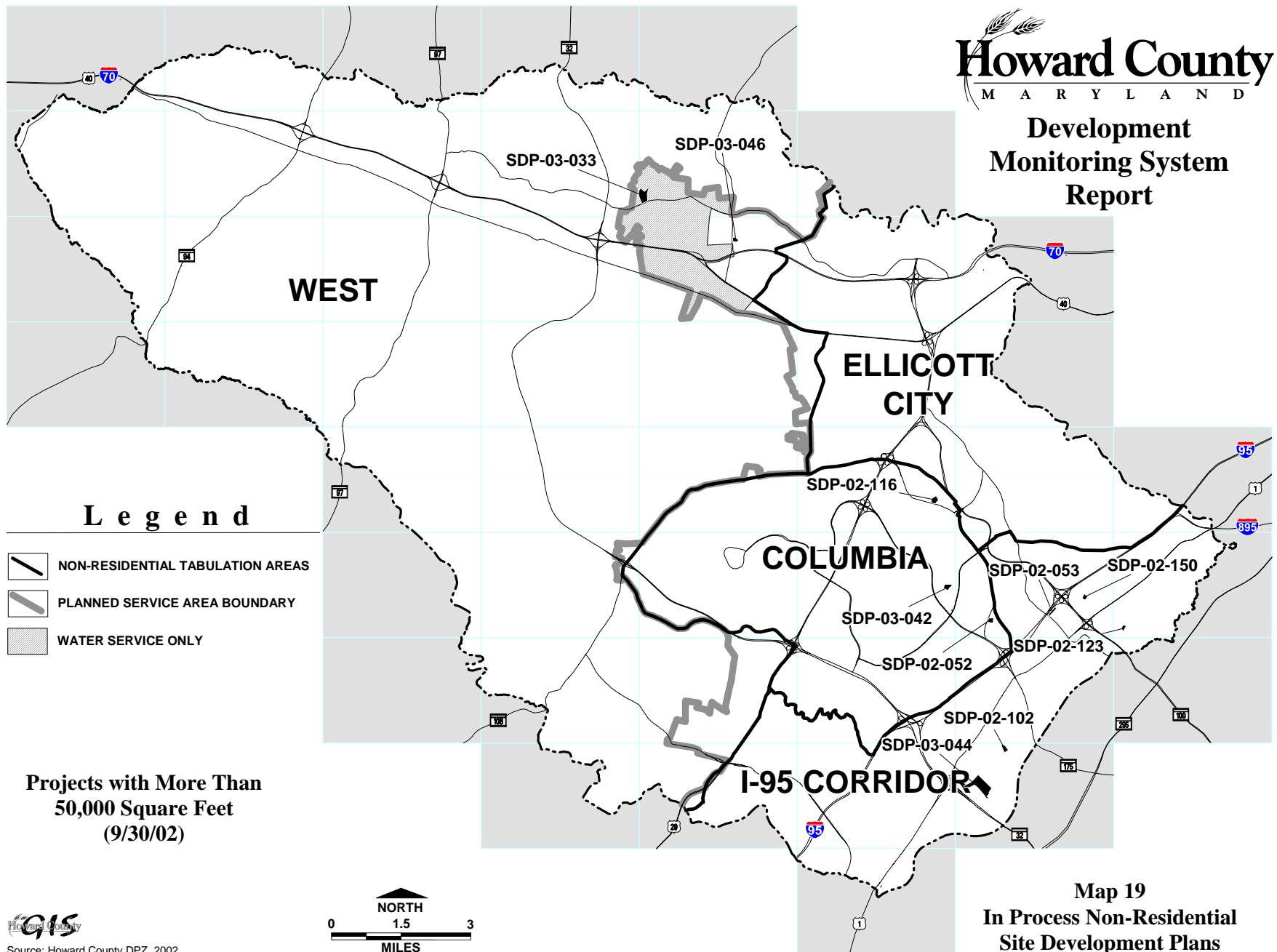


Table 62
Projects With More Than 50,000 Square Feet in In-Process Non-Residential Site Development Plans, 9/30/02

Region	File Number	Plan Name	Use	Building Area	TOTAL
Columbia	SDP-02-116	Columbia Palace Shopping Center	Retail - Supermarket	62,100	230,212
	SDP-03-042	Route 175 Commercial	Retail Site & Restaurant	70,112	
	SDP-02-052	Gateway Office Park	Office/Service	98,000	
I-95 Corridor	SDP-02-053	Route 100 Industrial Park	Warehouse	54,412	667,018
	SDP-02-102	Troy Hill Corporate Center	Warehouse & Small Office	65,685	
	SDP-02-123	Kane Companies, Inc. Headquarters	Warehouse & Office	81,795	
	SDP-02-150	Dorsey Woods	Warehouse & Small Office	120,000	
	SDP-03-044	Exeter Industrial Park	Distribution Center	345,126	
West	SDP-03-046	GTW's Waverly Woods	Office & Retail	78,040	214,792
	SDP-03-033	Northern High School	Government - New High School	136,752	
TOTAL					1,112,022



Non-Residential Building Permits

The final stage of the development process is the issuance of building permits. As indicated earlier, in Howard County building permits are required for all new construction. This section of the report tabulates building permits for all new non-residential construction. The number of permits issued as well as the associated square footage by building type have been compiled by region.

Summary of Last Year's Results

Last year from October 1, 2001 to September 30, 2002, 102 non-residential building permits were issued for new construction (Table 63). Columbia had the greatest number of issued permits with 30, 29 percent of the total. The I-95 Corridor had 27 issued permits (26 percent). The West and

Ellicott City had 23 and 22 issued permits, respectively.

Countywide, building permits were issued for close to 1.8 million square feet of non-residential space last year. Thirty-six percent of this total, about 650,000 square feet, was for office/service space. Another 616,000 square feet were for government & institutional space. There were also permits issued for about 243,000 square feet of retail space and about 188,000 square feet of manufacturing and extensive industrial space (Table 64).

By region, 581,000 square feet, 32 percent of the total, are in the I-95 Corridor. About 560,000 square feet are in Columbia and about 535,000 square feet are in the West. The remaining 125,000 square feet are located in Ellicott City.

Table 63
Issued Non-Residential Building Permits, 10/01/01 to 9/30/02

Region	Number	Percent
Columbia	30	29%
Ellicott City	22	22%
I-95 Corridor	27	26%
West	23	23%
TOTAL	102	100%

Last Year's Permits - Greater Than 50,000 Square Feet

Table 65 shows the major projects of more than 50,000 square feet that were issued building permits last year. These projects amount to almost 1 million square feet of space, about 55 percent of the 1.8 million square feet total. These larger projects are relatively evenly divided between the I-95 Corridor, Columbia and the West.

Table 64
Square Feet of Issued Non-Residential Building Permits by Type, 10/01/01 to 9/30/02

Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL	PERCENT
Columbia	161,691	175,090	6,600	208,907	5,412	557,700	31%
Ellicott City	24,088	22,699	0	78,323	0	125,110	7%
I-95 Corridor	13,093	191,726	181,257	100,169	94,990	581,235	32%
West	43,809	262,229	0	229,036	0	535,074	30%
TOTAL	242,681	651,744	187,857	616,435	100,402	1,799,119	100%
PERCENT	13%	36%	10%	34%	6%	100%	

1. Includes communication towers, utility buildings, guard house, non-employee generating storage space, and other such building types.

Table 65
Building Permits Issued for Major Non-Residential Projects With More Than 50,000 Square Feet, 10/01/01 to 9/30/02

Region	Subdivision	Proposed Use	Square Feet	TOTAL
I-95 Corridor	Columbia Corporate Park 100	Office/Building 4 Story Shell Building	106,236	346,483
	Freestate	Warehouse	105,500	
	Northeastern Elementary	Bellows Spring Elementary School	75,497	
	A H Smith Property	Route 1 Self Storage/Storage Building	59,250	
Columbia	Benson Business Park	Homewood Suites/Build New 4 Story Hotel	120,859	317,047
	Route 175 Commercial	EXPO Design Center	100,988	
	Howard Community College	HCC/Build New Classroom Building	95,200	
West	Johns Hopkins APL	JHU/APL Bldg 17 Office/Lab	240,429	333,429
	Western Middle School # 3	Western Middle School #3	93,000	
TOTAL				996,959

Permits of more than 100,000 square feet include a new office building in Columbia Corporate Park 100, a new warehouse in the Freestate subdivision, a new hotel in the Benson Business Park, the new Home Depot Expo Design Center, and a new lab/office building at Johns Hopkins APL. Map 20 shows the locations of these larger projects.

Five Year Results

Over the last five years from October 1, 1997 to September 30, 2002, 873 non-residential building permits were issued for new construction (Table 66). This is an average of about 175 permits per year. The number of permits has been dropping annually since the 97/98 year. Last year saw the most precipitous drop, from 145 issued permits in 00/01 to only 102 issued permits in 01/02, a 42 percent year over year reduction.

Over the five year period Columbia had the greatest number of issued permits with 370, about 42 percent of the total. The I-95 Corridor had 213 issued permits (24 percent). The West and Ellicott City and had 155 and 135 issued permits, about 18 and 15 percent of the total each, respectively.

Table 67 summarizes the square footage in issued building permits by development type for each of the last five years. The five year total is also shown in the bottom right hand corner of the table. For the five year period, building permits for about 14.7 million square feet of non-residential space have been issued in the County. This is an average of about 2.9 million square feet per year.

Of this total, almost 44 percent or 6.4 million square feet are for office/service space. About 32 percent or 4.7 million square feet are for

Table 66
Issued Non-Residential Building Permits, 10/01/97 to 9/30/02

Region	10/97-9/98	10/98-9/99	10/99-9/00	10/00-9/01	10/01-9/02	TOTAL	PERCENT
Columbia	133	77	81	49	30	370	42%
Ellicott City	32	29	32	20	22	135	15%
I-95 Corridor	60	48	33	45	27	213	24%
West	25	41	35	31	23	155	18%
TOTAL	250	195	181	145	102	873	100%

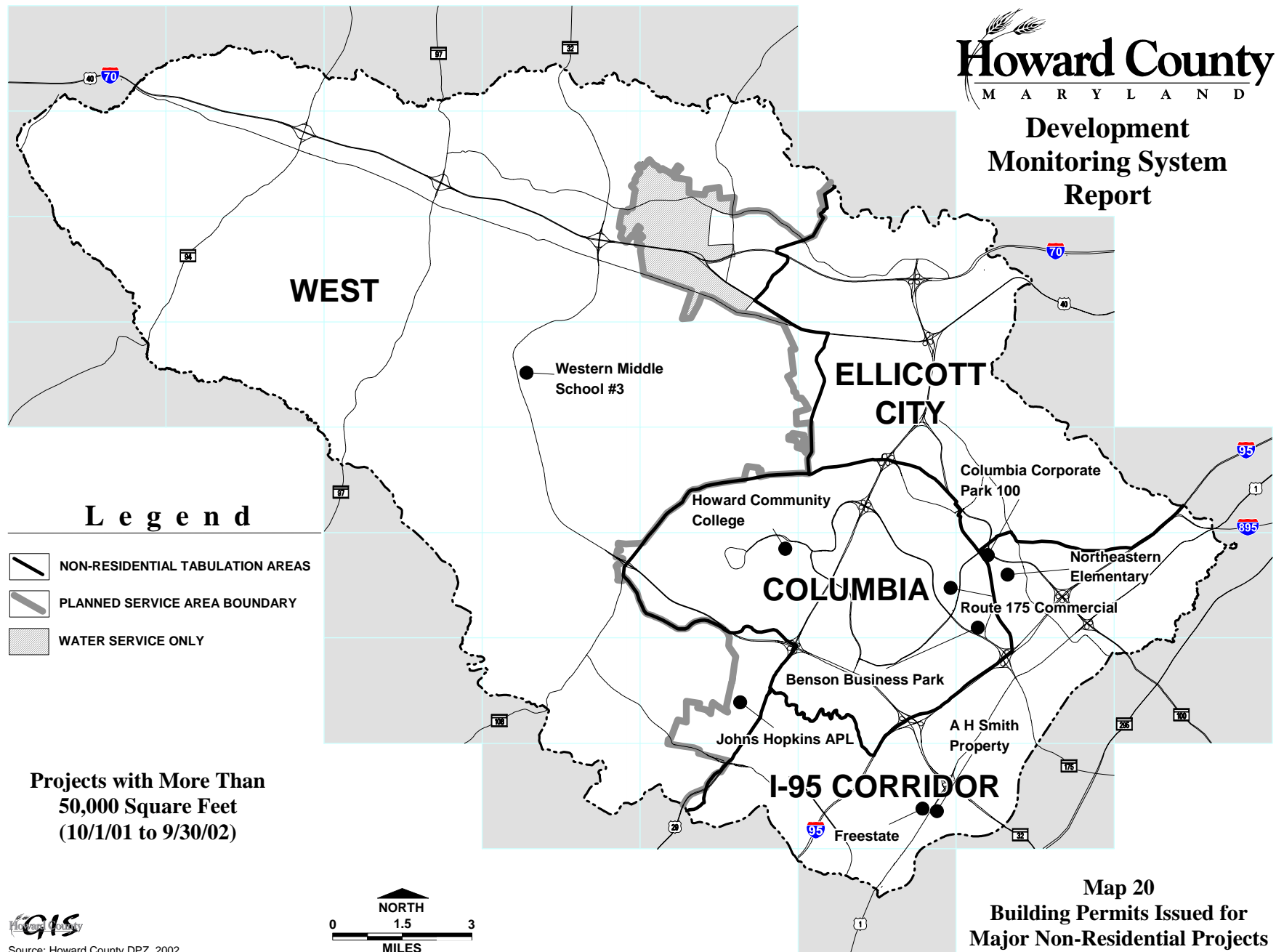


Table 67
Square Feet of Issued Non-Residential Building Permits by Type, 10/01/97 to 9/30/02

10/97 to 9/98							10/98 to 9/99					
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL
Columbia	531,784	904,223	103,549	0	28,150	1,567,706	99,515	1,307,173	95,230	31,179	13,334	1,546,431
Ellicott City	116,002	0	0	94,511	0	210,513	52,402	113,179	24,250	0	0	189,831
I-95 Corridor	110,316	111,781	720,951	5,700	0	948,748	47,074	162,882	1,391,075	0	2,926	1,603,957
West	13,752	161,280	0	91,770	0	266,802	33,064	38,675	0	45,728	0	117,467
TOTAL	771,854	1,177,284	824,500	191,981	28,150	2,993,769	232,055	1,621,909	1,510,555	76,907	16,260	3,457,686
PERCENT	25.8%	39.3%	27.5%	6.4%	0.9%	100.0%	6.7%	46.9%	43.7%	2.2%	0.5%	100.0%
10/99 to 9/00							10/00 to 9/01					
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL
Columbia	189,341	1,099,040	82,805	28,579	7,276	1,407,041	41,517	780,955	142,504	111,374	0	1,076,350
Ellicott City	207,918	164,672	0	116,731	613	489,934	6,477	64,269	0	34,408	0	105,154
I-95 Corridor	56,090	183,021	779,952	4,340	1,280	1,024,683	5,120	454,641	1,116,151	8,690	67,898	1,652,500
West	125,007	90,146	0	0	3,864	219,017	5,060	151,677	102,539	245,439	0	504,715
TOTAL	578,356	1,536,879	862,757	149,650	13,033	3,140,675	58,174	1,451,542	1,361,194	399,911	67,898	3,338,719
PERCENT	18.4%	48.9%	27.5%	4.8%	0.4%	100.0%	1.7%	43.5%	40.8%	12.0%	2.0%	100.0%
10/01 to 9/02							TOTAL 10/97 to 9/02					
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Other ¹	TOTAL
Columbia	161,691	175,090	6,600	208,907	5,412	557,700	1,023,848	4,266,481	430,688	380,039	54,172	6,155,228
Ellicott City	24,088	22,699	0	78,323	0	125,110	406,887	364,819	24,250	323,973	613	1,120,542
I-95 Corridor	13,093	191,726	181,257	100,169	94,990	581,235	231,693	1,104,051	4,189,386	118,899	167,094	5,811,123
West	43,809	262,229	0	229,036	0	535,074	220,692	704,007	102,539	611,973	3,864	1,643,075
TOTAL	242,681	651,744	187,857	616,435	100,402	1,799,119	1,883,120	6,439,358	4,746,863	1,434,884	225,743	14,729,968
PERCENT	13.5%	36.2%	10.4%	34.3%	5.6%	100.0%	12.8%	43.7%	32.2%	9.7%	1.5%	100.0%

1. Includes communication towers, utility buildings, guard house, and non-employee generating storage space, and other such building types.

manufacturing/extensive industrial space. Retail space accounts for about 12.8 percent of the total with about 1.9 million square feet. Government and institutional uses account for 9.7 percent of the total (1.4 million square feet). The remaining 1.5 percent (226,000 square feet) are for other uses.

Chart 26 graphically shows the countywide square footage by development type for each of the last five years. It is clear that there was a significant drop in the total amount of square footage issued in building permits last year compared to the previous four years. Last year's total of about 1.8 million square feet was only about 54 percent of the prior year's 3.3 million square feet total.

In particular, there was a significant reduction in the amount of manufacturing and extensive industrial space approved -- about 1.4 million square feet in 00/01 compared to only 190,000 square feet last year, more than seven times less. Office/service space also saw a steep decline last year from about 1.5 million square feet in 00/01 to only about 650,000 square

feet in 01/02. On the other hand, retail and government & institutional space actually increased compared to the prior year.

Chart 27 shows the five year square footage total by development type by region. It is apparent that most of the development over the last five years has been for manufacturing/extensive industrial and office/service uses. Furthermore, it is clear that most of the manufacturing/extensive industrial development has been in the I-95 Corridor and most of the office/service development has been in the Columbia region. Columbia also has the most retail development, followed by Ellicott City.

Chart 28 shows the total non-residential square footage in issued building permits over time for each region. For most years, Columbia and the I-95 Corridor had the most development, followed by the West and Ellicott City.

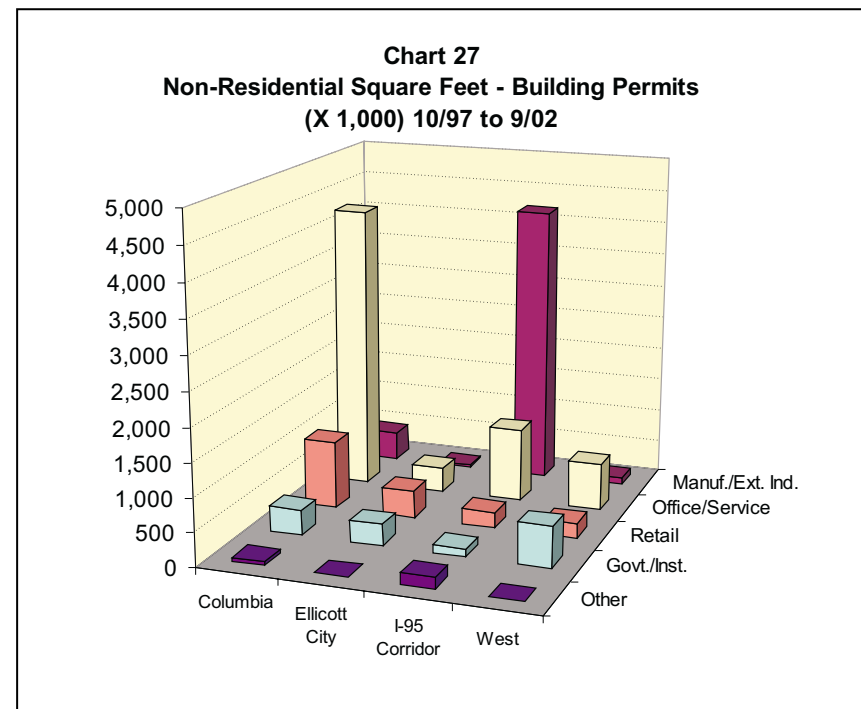
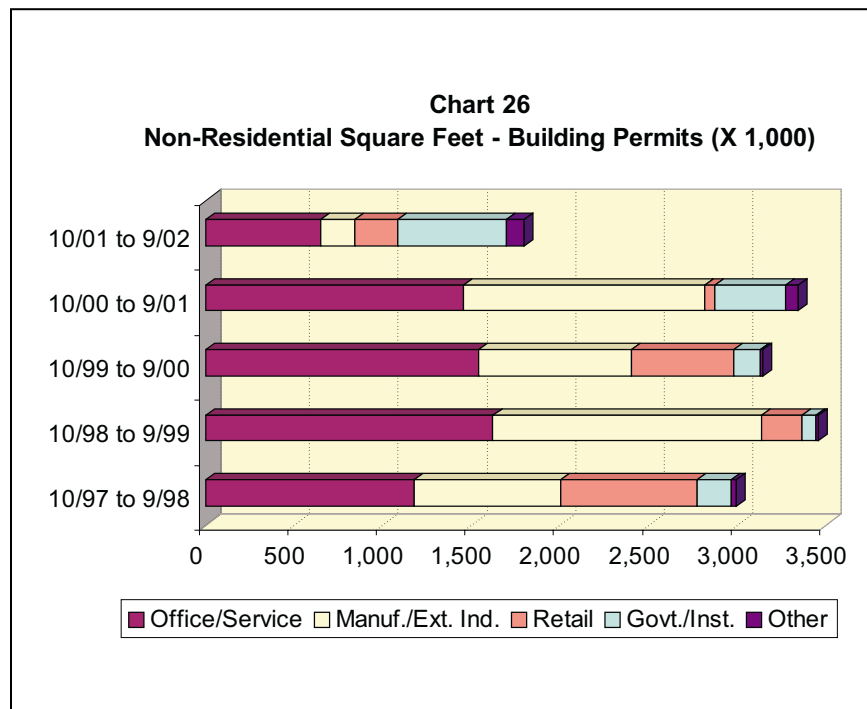
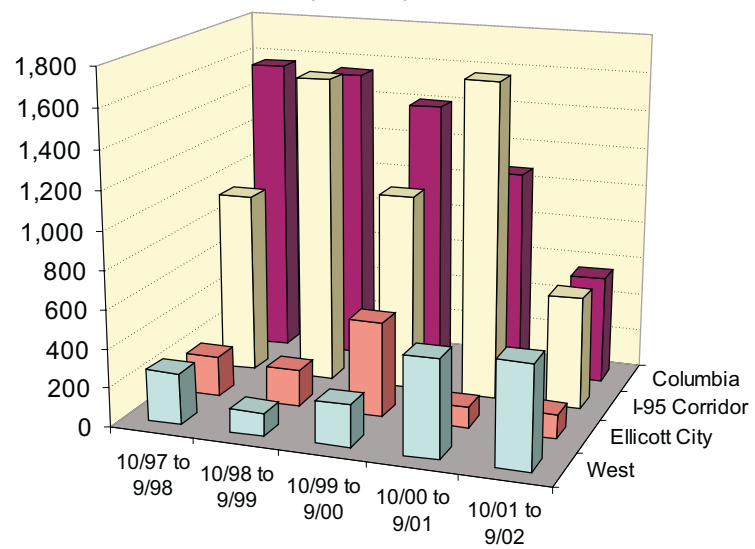


Chart 28
Non-Residential Square Feet - Building Permits
(X 1,000)



Employment Estimates

To estimate employment several steps were taken. First, employment estimates as indicated on site development plans were used. If this was not available, then employment was estimated based on the standard square feet per employee factors shown in Table 68. These factors are multiplied times the square footage of planned building space which is included on site development plans and building permits. In some cases, particularly for government and institutional uses and schools and religious facilities, owners or representatives of the property were contacted to determine potential employment.

Table 68 Square Feet per Employee Standard Factors	
Type of Space	SF/Emp.
Retail	400
Office/Service	250
Manufacturing/Extensive Industrial	1,000
Government & Institutional	250

The first section below estimates employment potential from site development plans. This is followed by an estimate from building permits. The last section discusses estimated actual employment changes as reported by the State Department of Labor, Licensing, and Regulation and the U.S. Bureau of Economic Analysis.

Estimated Employment from Site Development Plans

Last Year's Results

Space in site development plans approved last year from October 1, 2001 to September 30, 2002 could accommodate an estimated 3,148 employees (Table 69). About 47 percent of the potential jobs are located in the West, where they are mostly office/service jobs. About 33 percent of the potential jobs are in Columbia, also mostly office jobs. About 16 percent of the

Table 69 Potential Employment from Approved Non-Residential SDP's By Use Category, 10/01/01 to 9/30/02							
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Sch. & Rel. Facilities	TOTAL	PERCENT
Columbia	296	710	7	0	20	1,032	33%
Ellicott City	71	27	0	4	10	112	4%
I-95 Corridor	138	50	255	0	73	516	16%
West	146	1,261	0	0	81	1,488	47%
TOTAL	651	2,048	262	4	184	3,148	100%
PERCENT	21%	65%	8%	0%	6%	100%	

jobs are in the I-95 Corridor and 4 percent are in Ellicott City.

Countywide, 2,048 potential jobs, or about 65 percent of the total, are of office/service jobs. This is followed by 21 percent retail jobs, 8 percent manufacturing/extensive industrial jobs, 6 percent schools and religious facilities jobs and less than 1 percent government & institutional jobs.

Five Year Results

Tables 70 and 71 show the potential employment from approved site development plans over the last five years, from October 1, 1997 to September 30, 2002. Over the five year period, the total comes to 32,523 new jobs, an average of about 6,500 jobs per year. Table 71 shows that there has been a

Table 70 Potential Employment from Approved Non-Residential SDP's By Use Category, 10/01/97 to 9/30/02							
Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Sch. & Rel. Facilities	TOTAL	PERCENT
Columbia	1,268	14,199	853	152	87	16,558	51%
Ellicott City	879	1,409	1	334	178	2,802	9%
I-95 Corridor	537	4,909	3,658	0	128	9,232	28%
West	651	2,935	0	92	253	3,930	12%
TOTAL	3,335	23,452	4,511	578	646	32,523	100%
PERCENT	10%	72%	14%	2%	2%	100%	

Table 71
Potential Employment from Approved Non-Residential Site Development Plans

Region	10/97 to 9/98	10/98 to 9/99	10/99 to 9/00	10/00 to 9/01	10/01 to 9/02	TOTAL	PERCENT
Columbia	3,374	4,198	3,961	3,993	1,032	16,558	51%
Ellicott City	209	872	1,477	132	112	2,802	9%
I-95 Corridor	717	1,025	2,359	4,615	516	9,232	28%
West	813	643	654	332	1,488	3,930	12%
TOTAL	5,113	6,738	8,451	9,072	3,148	32,523	100%
PERCENT	16%	21%	26%	28%	10%	100%	

steady increase in new jobs annually until 00/01 based on approved SDP's since 1997, ranging from 5,113 in 97/98 to 9,072 in 00/01. Last year, however, the number of potential new jobs dropped substantially to only 3,148.

Similar to the one year results, the greatest percentage of the jobs are located in Columbia with 51 percent of the total. The I-95 Corridor has 28 percent of the total, followed by 12 percent in the West and 9 percent in Ellicott City. Most of the new jobs are office/service jobs followed by manufacturing/extensive industrial jobs and then retail jobs. Jobs for government and institutional and schools and religious facilities comprise only about 4 percent of the total.

Estimated Employment from Building Permits

Last Year's Results

An estimated 3,144 new jobs are projected based on issued building permits last year from October 1, 2001 to September 30, 2002 (Table 72). About 40 percent of the potential jobs, mostly office/service jobs, are located in the West. About 34 percent of the jobs are in the I-95 Corridor. The remaining 22 percent of the jobs are in the Columbia and 5 percent are in Ellicott City.

Countywide, 2,154 potential jobs, or about 68 percent of the total, are office/service jobs. This is followed by 19 percent retail jobs. The remaining 12 percent are manufacturing/extensive industrial and schools and religious facilities jobs.

Table 72
Potential Employment from Issued Non-Residential Building Permits
By Use Category, 10/01/01 to 9/30/02

Region	Retail	Office/Service	Manuf./Ext. Ind.	Govt. & Inst.	Sch. & Rel. Facilities	TOTAL	PERCENT
Columbia	404	247	0	0	30	681	22%
Ellicott City	60	91	0	0	10	161	5%
I-95 Corridor	33	767	181	0	77	1,058	34%
West	110	1,049	0	0	86	1,244	40%
TOTAL	607	2,154	181	0	203	3,144	100%
PERCENT	19%	68%	6%	0%	6%	100%	

Five Year Results

Tables 73 and 74 show the potential employment from issued building permits over the last five years, from October 1, 1997 to September 30, 2002. Over the five year period, the estimate results in 35,667 new jobs, an average of about 7,133 jobs per year.

As expected, the greatest percentage of the jobs are located in Columbia with about 56 percent of the total. The I-95 Corridor has about 26 percent of the total, followed by 11 percent in the West and 6 percent in Ellicott City. Most of the new jobs are office/service jobs followed by manufacturing/extensive industrial jobs and then retail jobs. Jobs for the government and institutional and school and religious facilities categories comprise less than 3 percent of the total.

Table 73
Potential Employment from Issued Non-Residential Building Permits

Region	10/97 to 9/98	10/98 to 9/99	10/99 to 9/00	10/00 to 9/01	10/01 to 9/02	TOTAL	PERCENT
Columbia	6,141	5,446	4,436	3,444	681	20,148	56%
Ellicott City	449	315	981	296	161	2,202	6%
I-95 Corridor	1,675	2,276	1,348	2,954	1,058	9,310	26%
West	940	208	664	949	1,244	4,006	11%
TOTAL	9,205	8,245	7,429	7,643	3,144	35,667	100%
PERCENT	26%	23%	21%	21%	9%	100%	

Table 74
Potential Employment from Issued Non-Residential Building Permits
By Use Category, 10/01/97 to 9/30/02

Region	Retail	Office/ Service	Manuf./ Ext. Ind.	Govt. & Inst.	Sch. & Rel. Facilities	TOTAL	PERCENT
Columbia	2,732	16,999	259	54	105	20,148	56%
Ellicott City	924	1,056	4	5	213	2,202	6%
I-95 Corridor	475	4,168	4,582	2	83	9,310	26%
West	583	2,896	103	90	334	4,006	11%
TOTAL	4,714	25,119	4,947	151	735	35,667	100%
PERCENT	13%	70%	14%	0%	2%	100%	

State of Maryland Employment Estimates

The previous sections estimate *potential* employment from new development. This section provides an overview of estimated actual employment changes as reported by the State Department of Labor, Licensing, and Regulation (DLLR). This would include an increase in employment from new development as well as new jobs created in existing building space. The latter would generally reflect a decrease in vacancy rates. It could also be a result of the re-configuration of existing building space resulting in more jobs per square foot. An example of this is the re-configuration of a warehouse to office use.

DLLR reports statistics produced by Maryland's ES-202 Program. The data are generated and published on a quarterly basis and include all work-

ers covered by the Unemployment Insurance (UI) Law of Maryland and the unemployment compensation for federal employees (UCFE) program. Together these two account for approximately 98 percent of all wage and salary civilian employment. Since wage and salary employment represents approximately 93 percent of total civilian employment, DLLR estimates that their data reflects over 91 percent of all civilian employment. However, a comparison of the State data with federal employment data from the Bureau of Economic Analysis (BEA) shows that about 27 percent of Howard County's employment in 2000 was not reported by the State.

Table 75 shows both DLLR and BEA employment data and the annual increase from 1997 to 2002. BEA data generally has a two year lag time resulting in no available data for 2001 and 2002. Observing the most recent State data, reflecting the first quarter employment data for each year, there has been an average increase of 5,639 jobs per year for the last five years. Last year, from 2001 to 2002, the State reports that 2,397 new jobs were added in Howard County, significantly less – almost 60 percent less – than both the five year average and then number of new jobs during the previous year. This can be attributed to the recent downturn in the economy.

Tables 76 shows the jobs and average wages by job type as reported by the State for the first quarter of 2001 and 2002. In the first quarter of 2002, the State reported that there were 133,114 jobs in Howard County with an average weekly wage of \$799. This compares to 130,717 jobs one year earlier with an average wage of \$768. This is net increase of 2,397 jobs and a 4.04 percent increase in average wages.

Table 75
Jobs in Howard County

Year	DLLR ¹		BEA ²	
	Jobs	Increase	Jobs	Increase
1997	104,920		140,482	
1998	110,732	5,812	148,356	7,874
1999	117,650	6,918	157,705	9,349
2000	124,843	7,193	163,009	5,304
2001	130,717	5,874	NA	NA
2002	133,114	2,397	NA	NA
Average		5,639		

1. Maryland State Department of Labor, Licensing and Regulation
(1st quarter employment)

2. U.S. Bureau of Economic Analysis (annual employment)

Table 76
Jobs and Wages by Industry, 2001 and 2002¹

Job Type	2001		2002	
	Jobs	Avg. Wage	Jobs	Avg. Wage
Government Sector				
Federal Government	763	\$1,105	716	\$1,101
State Government	3,876	\$792	3,867	\$821
Local Government	11,053	\$670	11,380	\$720
Subtotal/Average	15,692	\$722	15,963	\$762
Goods Producing				
Natural Resources and Mining	269	\$410	272	\$448
Construction	11,444	\$909	11,032	\$910
Manufacturing	8,658	\$888	7,246	\$978
Subtotal/Average	20,372	\$894	18,550	\$930
Service Providing				
Trade, Transportation, and Utilities	34,521	\$714	35,715	\$719
Information	2,289	\$1,166	2,083	\$1,113
Financial Activities	6,847	\$1,122	8,089	\$1,180
Professional and Business Services	24,547	\$972	25,839	\$1,046
Education and Health Services	11,570	\$600	12,094	\$623
Leisure and Hospitality	10,588	\$261	11,001	\$262
Other Services	4,168	\$552	3,638	\$533
Subtotal/Average	94,530	\$750	98,459	\$781
Unclassified	122	\$536	142	\$598
TOTAL	130,717	\$768	133,114	\$799

1. State Department of Labor, Licensing and Regulation (1st quarter employment)

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